



TELEPHONE BANKING ROLE SPECIFICATION

Job Title: Telephone Banking Advisor

Role No: TBC

Reports to: Team Leader

Date: October 2008

KEY PURPOSE

To be the first point of contact for customer calls, providing an excellent level of customer service, meeting the needs of our customers and seeking opportunities to extend and develop the customer relationship.

ACCOUNTABILITIES

- Answer customer calls in an efficient and effective manner providing the highest level of customer service by aiming to meet the needs of our customers at the first point of contact.
- Identify opportunities to further extend/develop the customer relationship by promoting the Bank's products and services in order to fully meet their financial needs.
- Contribute to the achievement of the Contact Centre Balanced Scorecard through the achievement of key aims and objectives.
- Promote alternative delivery channels such as Internet Banking and IVR ensuring that all customers are aware and have full access to the Bank's complete range of service delivery channels.
- Ensure that all customers are dealt with in accordance with all compliance and regulatory requirements (including internal processes and procedures) which aim to protect our customers as well as the reputation of the Lloyds TSB Group.
- Maintain a good understanding of Bank's products and services including key features and benefits
- Ensure that all call handovers to other areas of the Group are carried out in an effective and efficient manner



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