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| **Person Specification**  **Post Title: Customer Advisor / Administrator** | | | |
| ***Applicants should meet all of the essential requirements and should note where they will be assessed.*** | | | |
|  | **Essential** | **Desirable** | **How Identified** |
| **1. Educational**  **Qualifications** | SCQF Level 4 or equivalent in English and Maths. |  | Application form |
| **2. Previous**  **Experience** |  | Experience in communicating with a variety of customers face to face and over the telephone | Application/interview |
|  | Recent and relevant administration experience in a busy working environment | Application/interview |
|  | Previous experience of working in the Credit Union sector or dealing with personal finances. | Application/interview |
|  | Previous experience of working with socially excluded people | Application/interview |
| **3. Core Skills** | Excellent verbal and written communication skills – e.g. asks the appropriate questions to clarify understanding; communicates clearly under pressure; summarises information to check understanding |  | Application/interview |
| Competent user of Information Technology including Word, Excel, and Outlook | A flair for using Information Technology including financial accounting systems or software.  Experience of using social media as a promotional tool. | Application/interview |
| Able to work well with others – e.g. is courteous, tactful and diplomatic; responds positively to requests for help from internal and external partners; encourages and supports other colleagues |  | Application/interview |
| Good organisational skills; demonstrates organised approach to work; refers to others when necessary; checks for accuracy to get things right |  | Interview/probation review |
| Problem solving aptitude; looks for and suggests ways to improve current working practices |  | Application/interview |
| Ability to work under pressure and work with minimum supervision |  | Interview/probation review |
| **4. Knowledge** | Understanding the need for confidentiality |  | Interview/probation review |
| Demonstrates understanding of aims and objectives of Credit Unions | Understanding of how a Credit Union operates. | Application/interview |
|  | Knowledge of the Credit Union sector and legislation | Application/interview |
| **5. Personal**  **Behaviours** | Enjoys working under variable demands and is self-motivating |  | Interview/probation review |
| Pleasant, friendly manner and committed to customer care |  | Interview/probation review |
| Flexible and hard working |  | Interview/probation review |
| Willingness to learn and expand knowledge including keeping professional knowledge up to date |  | Interview/probation review |
| Has Customer Service Experience uppermost in mind at all times and treats all customers with respect |  | Interview/probation review |
| **6. Other** | Takes responsibility for achieving results |  | Interview/probation review |