

# Job role: Member Services Manager (Certified)



**Responsible to:** CITO

**Band:**

**Department:** Member Services

## PURPOSE

To lead and manage the delivery of outstanding customer service across the customer service operation.

The role ensures that members receive fair and timely outcomes, regulatory standards are met, and the team operates efficiently, safely and in line with the Society's values. As a Certified Role under SM&CR, the postholder is accountable for maintaining their own fitness and propriety and upholding the FCA Conduct Rules.

## ACCOUNTABILITIES

### Customer Experience & Member Outcomes

- Ensure members receive excellent service across all channels and interactions.
- Monitor and manage service performance indicators (complaints, SLA, ).
- Drive a culture of member-first service aligned to Consumer Duty.
- Identify vulnerable customers and ensure they receive appropriate support.
- Implement service improvements based on customer insight and operational data.

### Regulatory Compliance & Conduct

- Maintain full compliance with FCA regulations, including Consumer Duty, and financial crime guidance.

- Uphold and role-model the FCA Conduct Rules.
- Ensure staff adhere to policies, procedures and regulatory requirements.
- Escalate breaches, risks or issues promptly.
- Complete all mandatory training and maintain annual certification records.
- You must act to deliver good outcomes for retail customers
- Foster a culture of collaboration, integrity and continuous improvement.

### **Team Leadership & Development**

- Lead, motivate and develop the customer service team.
- 1 direct certified report (Technical Administration Manager and Retentions Officer) plus management of a team of Customer Services Associates
- Set clear performance expectations and deliver regular coaching and feedback.
- Conduct performance reviews, identify development needs and support career progression.
- Ensure appropriate staffing levels and manage scheduling, workload and resource planning.
- Foster a culture of collaboration, integrity and continuous improvement.

### **Operational Excellence**

- Oversee daily operations ensuring accuracy, efficiency and adherence to process.
- Ownership and manage risk and internal controls, ensuring any weaknesses are addressed.
- Support implementation of new systems, processes and service initiatives.
- Ensure business continuity arrangements are understood and upheld.
- Ensure a deep knowledge and understanding of our savings products and savings/mortgage administration processes. Continuously seek opportunities for process/service improvement

### **Complaints, Quality & Risk Management**

- Oversee complaints to ensure fair and timely resolution.
- Act as an escalation point for complex customer issues.

- Conduct or oversee quality assurance checks across service interactions.
- Analyse complaint and QA trends to identify root causes and recommend solutions.
- Maintain accurate records and support audits or regulatory reviews.

### **Data, Reporting & Stakeholder Engagement**

- Prepare timely, accurate MI on service performance, risk and team productivity.
- Use data insights to drive improvements and inform decision-making.
- Collaborate with Risk, Compliance, Operations and Product teams to improve member experience.
- Provide frontline insight to support product or service enhancements.

## **CORE COMPETENCIES**

### **Behavioral Competencies**

- **Customer Focus** – places members at the heart of decision-making.
- **Integrity & Accountability** – takes ownership, acts ethically and ensures compliance.
- **Leadership** – inspires others, builds capability and drives performance.
- **Collaboration** – works effectively across departments to achieve shared goals.
- **Continuous Improvement** – seeks efficiencies, challenges the status quo and drives innovation.
- **Judgement & Decision Making** – uses data, insight and experience to make sound decisions.

## **KNOWLEDGE/SKILL/EXPERIENCE**

### **Essential**

- Proven experience in a customer service leadership role within financial services.
- CEMAP Qualified

- Strong understanding of FCA regulations, including Consumer Duty and Conduct Rules.
- Excellent communication, coaching and people management skills.
- Good understanding of risk, controls and operational best practice.
- Ability to analyse data and make evidence-based decisions.
- Sound judgement and strong problem-solving skills.

### **Desirable**

- Knowledge of savings, mortgages and general retail banking operations.
- Formal leadership or customer service qualification.

### **Certification Responsibilities (SM&CR)**

- Demonstrate ongoing fitness and propriety annually.
- Maintain up-to-date knowledge of regulatory requirements and organisational policies.
- Evidence training, competence and CPD.
- Role-model the Conduct Rules and ensure team members understand their responsibilities.

