

Business Specialist



Purpose

This role is responsible for providing high quality customer service, ensuring all stakeholders are kept informed end-to-end to promote and drive customer satisfaction and advocacy. With a focus on building and maintaining customer relationships, this role will provide administration support to the Business and Property Finance team and its customers, while supporting to identify cross-sell opportunities to enhance the customer experience and contribute to the growth and retention of TSB's Customers, in line with TSB's strategic objectives.

Role dimensions

- **Reports to:** Team Leader – Business & Property Finance
- **Division:** Customer Delivery
- **Direct Reports:** N/A

Person specifications

- New Zealand Certificate in Financial Services Level 5 or equivalent qualification.
- 3+ years in a banking / financial services role with experience across onboarding, AML and loan documentation processes
- Demonstrated commercial acumen and sound attention to detail.
- Proven interpersonal skills, including written and verbal communication and the ability to collaborate and build relationships at all levels.
- Proficient use of Microsoft office suite

Role specific areas of responsibility

- Undertake interviews and complete applications for SME customers, delivering meaningful quality conversations to help educate and engage with customers to identify suitable options that help them meet their business goals.
- Support to develop long term relationships with customers to accurately understand and support their financial needs at each stage, delivering unparalleled customer care to support the growth and retention of existing portfolios.
- Support with administration activities including but not limited to the preparation of contracts, instructions and other documentation as per loan approval, load loans and update changes of existing loans on the Bank system and the registration and renewal of Bank securities, while ensuring the completion of all relevant compliance and AML activity as required by Business and Property Finance.
- Triage all leads to Commercial & SME including pre-qualification to meet the Bank's SLA's and customer time frames, and Assist clients in establishing new accounts, including normal day to day transactional accounts, and actively assist & monitor retention of existing business and fixed rate loan rollovers.
- Contribute to the delivery of key activities to deliver customer growth and retention, ensuring all lending retention tasks are completed prior to due dates including fixed rate rollover and customer care calls.
- Support across the team, to collaborate, cross-skill and build effectiveness, assisting with operational and administrative activity across the wider function as required.

From time to time there may be additional activity not contained within this position description that the appointee is to complete in the interests of the appointment and their own personal development.

This position description provides a broad overview of responsibilities. The position description is a living document, and the Bank reserves the right to amend from time to time as required.