Customer Service Officer: Position Description

Role:

The Customer Service Officer is a first point of contact for VFS customers.

The primary role of a Customer Service Officer within the team is to respond to a variety of customer requests and inquiries via the telephone or in person over the counter.

The range of inquiries and requests customer service officers may respond to include:

- Inquiries and requests on banking products and services such as savings, cheque, business and loan accounts, telephone banking and internet services.
- Inquiries about superannuation products.
- Inquiries about death and disability insurance and income protection.

Responsibilities:

A Customer Service Officer is responsible for the following duties:

- Receive and respond to customer service account inquiries on account balances, transaction details, statements and fees and charges.
- Open new accounts/Closing accounts
- Alterations to existing savings and cheque accounts
- Inquiries for home, car and personal loans
- Inquiries on internet services
- Handling cash transactions and cash balancing
- Overseas transfers
- Set up periodical payment authorities on accounts
- Promote bank products and services
- Change statement of account cycles
- Identify customer needs
- Refer customers to appropriate banking services and representatives.

A Customer Service Officer must always perform their duties in line with the organisation’s policy and procedures, service standards and code of practice. They should operate within their level of authority and responsibilities.

Authorities:

A Customer Service Officer has the authority to:

- Update personal details for personal and business customers such as address and name details
- Receive deposits and issuing funds upon request
- Open new savings and cheque accounts
- Close savings and cheque accounts
- Issue cheque books
- Issue Travellers cheques
- Issue ATM cards and change customer passwords
- Provide product brochures for customers
- Refer customers who request to open business accounts and business credit cards to Customer Service Supervisor
- Refer customers who request loan, superannuation and insurance products to a financial adviser or financial planner