



**Want to work  
at Summerland?  
Join our team!**



# Want to work at Summerland? Great choice!

As a customer owned organisation, we're not like a major bank, as our profits don't go to external shareholders. We're defined by our mutuality, which means we're owned by our customers, run by our customers, and everything we do is for the ultimate benefit of our customers.

## Our Purpose

why we are here

**Better banking,  
stronger  
communities**

## Our Vision

what we want to achieve

**To be Australia's  
most successful  
customer-owned  
bank**

## Our Values



Default to  
positivity



Be brave



People  
matter most



Make  
others proud



Keep it  
simple



## A local, sustainable kind of banking - one with your best interests at heart

Summerland has a long history of integrating sustainability practices into our business. We exist for the benefit of our customers and the communities we serve. Our Environmental, Social and Governance principles ensure we maintain a focus on good practices, while supporting our customers and communities. benefit of our customers.



## Giving back to our community

We strive to support a wide range of community groups with:

- Community sponsorships
- Community accounts
- Reduced rate for Eco Loans
- Staff paid Volunteer Day

## People matter most

Our people are considered our greatest asset and key differentiator. It's good business to enable our people to thrive with great training and coaching support.

Respectful relationships provide a strong foundation for our workplace culture; expressing the way we do business with our customers. It's one of the reasons we have been awarded Kincentric Employer of the Year, for three consecutive years.



**KINCENTRIC**  
**Best Employers**

AUSTRALIA 2022

## What Summerland offers you

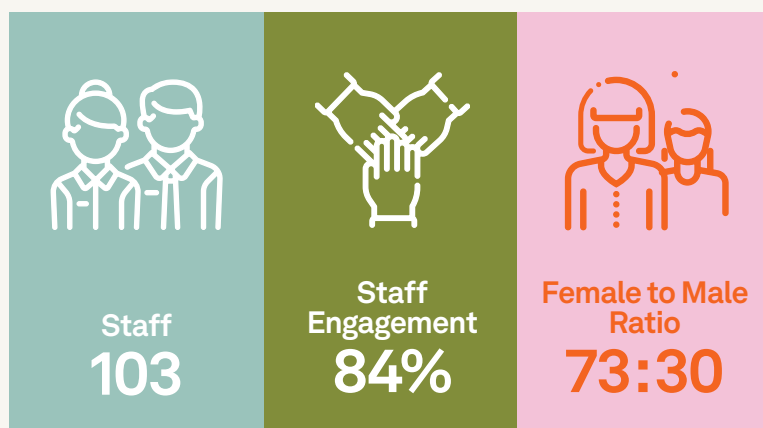
- Above award wages
- Training and career development
- Flexible working conditions
- Concessional interest rates
- Staff fee exemptions
- Modern working environment
- A uniform allowance
- Professional success with a community focus
- Employee Assistance Program: wellbeing for staff and their families
- Lots of fun, we have great staff social events
- Opportunity for career breaks to do the things you love
- An opportunity to remain in a vibrant community without having to relocate
- An awesome place to work!

## Learning and Development

At Summerland, you will not just be doing a job, you can also build a career.

We are committed to providing learning and development opportunities for you to thrive:

- Induction and orientation (comprehensive 6 month program)
- Traineeships in various certificates eg: Financial Services, Business, Accounting
- On-going products and systems training
- Easy to understand compliance requirements via our online learning platform
- Leadership, management, mentoring and coaching skills
- People and Culture portal to manage all your career needs



## Local branches across the beautiful Northern Rivers

Employing over 100 staff with branches stretching from Grafton to The Pines at Elanora and Head Office in Lismore, Summerland is one of the largest locally owned and operated businesses in the region offering a wide variety of careers across customer services and business support, including:

- Contact Centre Services
- Banking Advisors
- Banking Specialists
- Lending Specialists
- Loans Support
- Credit
- Payments Processing
- Systems Analysts
- Business Analysts
- Finance
- Information Technology
- Legal/Compliance
- Marketing
- Executive Assistants

## Banking Advisor – Contact Centre

### Purpose

Welcome to Summerland Bank, where banking meets community values.

We are a customer-owned bank and a certified B Corporation, dedicated to serving the residents of a vibrant regional area in Australia. At Summerland Bank, we prioritise the well-being of our customers and our environment, ensuring that every financial decision we make aligns with our commitment to social and environmental responsibility. As we continue to grow, we are seeking passionate individuals who share our vision and want to contribute to the positive impact we make in our community. Our multi-award-winning transformational culture is how we sustainably succeed in serving regional communities for over 60 years.

Join us and become part of a team that values integrity, sustainability, and the power of banking for good to deliver on our purpose: Better Banking, Stronger Communities.

### Overview

The Banking Advisor provides superior service that meets the needs of our valued customers. You deliver an exceptional customer experience whilst maintaining our agreed levels of service and achievement of Key Performance Indicators (KPIs).

You bring an engaging, innovative style to each customer needs conversation, asking questions to deeply understand, and offering agile solutions and referrals to meet unique customer needs. You present an attractive and memorable brand that people want to be a part of, delivering an impactful customer experience that leads to enduring relationships. Your product knowledge, service experience and agility in meeting customer needs grows our customer base and brand awareness. You understand how your role delivers the Summerland vision and mission and can articulate the value you add with relevance to customers.

You are committed to personal growth, act with integrity and accountability, have fun along the way, and celebrate success as one team. You thrive in a performance culture, do not shy away from challenges, act with agility, adaptability and have the will to succeed. You ooze passion and confidence to demonstrate ease in developing relationships with customers and colleagues. You are open to new ideas, seize opportunity, and deliver simple, sustainable solutions.

## Ideal Match

- Conduct that aligns with our vision, mission, and values
- Relevant experience in a customer focused environment
- Understanding of financial services products
- Prior knowledge of financial services regulations, guidelines, and attainment of a Certificate III in Financial Services desirable but not a requirement
- Excellent communication/interpersonal skill including verbal, written, traditional and digital systems
- Demonstrates confidence when dealing with a wide range of people related matters
- Excellent time management, prioritisation, and organisational skills
- Critical thinker with ability to respond quickly to customer needs with meaning and purpose with a 'can-do' attitude
- Demonstrated problem solving capacity
- Demonstrated capability in establishing and maintaining professional internal and external relationships
- An aptitude for technology and learning new programs, systems, and processes
- A demonstrated passion for self-development

Whilst preferred, it is not essential for you to have a background in banking as we can teach the successful candidate all they need to know. What is most important is your commitment to genuine and meaningful conversations and the ability to generate business from internal and external sources.

## Key Responsibilities

Responsibility	How you make a difference
Meet Total Customer Needs	<ul style="list-style-type: none"><li>• Deliver simplicity by ensuring the complexity of process and compliance rests with us and not the customer, creating a smooth cross-channel experience for customers</li><li>• Every Conversation Matters – confidently engages in conversations with customers, asking questions to identify customer needs and ascertain opportunities for providing products and services</li><li>• Customer Service – provides consistently high standards of customer service. Maintains professional and calm composure, escalates difficult calls as required and where appropriate</li><li>• Problem Solving – provides innovative solutions to problems whilst remaining within delegations and procedural requirements</li><li>• Day to day accurate and complete input of customer conversations within CRM</li><li>• Actively promote the Summerland brand in day to day activities and at Summerland events</li></ul>
Teamwork	<ul style="list-style-type: none"><li>• Contribute to a positive team environment by consistently living our values</li><li>• Proactive team engagement with a willingness to share the workload and bring a positive attitude, flexibility, and adaptability to the achievement of priorities</li></ul>

	<ul style="list-style-type: none"> <li>• Operate as one team to provide support, encouragement and collaboration across the business</li> <li>• Be brave, challenge constructively and continually raise the standard to make each other proud</li> <li>• Coach and mentor self and others for knowledge transfer, growth, and development</li> <li>• Participate in Summerland volunteer days to give back to our community</li> </ul>
Compliance & Accuracy	<ul style="list-style-type: none"> <li>• Ensure compliance across all operating procedures and processes</li> <li>• Ensure transactions are completed in accordance with procedure</li> <li>• Ensure product applications are processed accurately, and procedure followed</li> <li>• Maintain financial services legislation accreditations and ensure LMS compliance is up to date</li> <li>• Apply creativity and experience to provide innovative ideas for sustainable business growth and continual product and process improvements</li> <li>• Maintain currency of systems, processes, compliance, and risk</li> <li>• Ensure that credit union staff and assets are protected and that risks are managed through application of your knowledge, skill, and experience</li> </ul>
Performance	<ul style="list-style-type: none"> <li>• Deliver on expectations regarding performance and behaviours in accordance with our values</li> <li>• Achieve/exceed objectives to support business performance</li> <li>• Actively support campaigns to contribute to targets</li> <li>• Take ownership for results, track performance against agreed priorities, report on progress and seek regular feedback for the development</li> <li>• Actively participate in training, coaching, mentoring and performance reviews with a strong focus on self-development and team results</li> <li>• Continually develop sales and service capability to achieve the best outcome for customers</li> <li>• Perform all activities in accordance with Summerland policy, procedure and process and aligned with our corporate values</li> <li>• Perform other duties as assigned, including but not limited to key responsibilities outlined in the position description</li> </ul>
Self-Development	<ul style="list-style-type: none"> <li>• Self-regulate to operate confidently and calmly when under pressure to ensure positive outcomes</li> <li>• Self-manage to establish / maintain professional working relationships and contribute as a valued and reliable team player</li> <li>• Be highly pro-active and exercise agility and conviction in decision making with sound judgement and initiative to make moments matter</li> <li>• Maintain personal and workstation presentation to ensure that the customer environment is a positive and professional space</li> </ul>