THE CAMBRIDGE BUILDING SOCIETY

Customer Experience Coach

KEY INFORMATION

Role: Customer Experience Coach

Reports to: CCC Manager

Grade: 5

PURPOSE

To coach, develop and support Contact Centre colleagues to deliver consistently exceptional customer experiences, high-quality customer outcomes and meaningful conversations across all customer contact channels.

The role will use observations, call evaluations, quality assurance, customer feedback and performance insight to identify development needs, build colleague confidence and capability, reduce errors and continuously improve service quality and the customer journey.

CRITICAL SUCCESS FACTORS

Demonstrable improvement in colleague capability, confidence and competence.

Consistently strong quality assurance and call evaluation results.

Reduction in recurring errors and knowledge gaps through effective coaching.

Strong and improving CSAT and customer experience outcomes.

Consistently high standards of meaningful customer conversations.

Effective identification and support of vulnerable customers.

Improved colleague understanding of risk, compliance and customer outcome requirements.

Effective and timely real-time and escalation support.

Clear evidence that coaching activity results in measurable performance improvement.

Continuous improvement in service quality and the overall customer journey.

BEHAVIOURS

Members First – puts member needs and outcomes at the heart of coaching and development.

Exceed Expectations – inspires colleagues to consistently deliver exceptional service and quality.

Make It Happen – takes ownership of development needs and follows coaching through to measurable improvement.

Better Together – creates a supportive learning environment and shares knowledge and best practice.

Embrace Improvement – actively seeks feedback, identifies learning opportunities and encourages colleagues to develop.

Respect Always – provides coaching and feedback with integrity, fairness, professionalism and respect.

Main Duties Within Role

- Deliver structured coaching, mentoring and observations to Contact Centre colleagues, supporting individual development and improved performance.
- Complete regular call evaluations and quality assessments, providing clear, timely and constructive feedback.
- Identify recurring errors, knowledge gaps and development needs, providing targeted coaching to improve colleague competence and reduce repeat errors.
- Support colleague Training & Competency (T&C) activity, helping ensure required knowledge, skills and competency standards are achieved and maintained.
- Champion service excellence and meaningful customer conversations, coaching colleagues to understand customers' wider needs and deliver appropriate, personalised support.
- Coach colleagues to recognise and appropriately support vulnerable customers, ensuring individual needs and circumstances are understood and fair outcomes are achieved.
- Provide real-time support and guidance to colleagues on complex customer queries, processes and customer situations.
- Provide appropriate escalation support, helping colleagues confidently resolve customer issues and achieve positive outcomes wherever possible.
- Support Team Leads with colleague development, sharing relevant coaching insight, quality trends and development needs to inform performance conversations.
- Build colleague knowledge, skills and confidence, creating a supportive environment where colleagues feel empowered to take ownership of customer interactions.
- Use CSAT, customer feedback, complaints, quality results and error trends to identify coaching priorities and opportunities to improve the customer experience.
- Coach colleagues to identify appropriate business growth and customer relationship opportunities through meaningful, needs-based conversations.
- Identify recurring customer journey issues and work collaboratively with relevant teams to recommend customer journey and process improvements.
- Support the embedding of risk, compliance, quality and customer vulnerability standards, reinforcing good practice through coaching and development.
- Champion continuous improvement, sharing best practice across the Contact Centre and undertaking any other duties and responsibilities that reasonably fall within the scope of the role.
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Qualifications & Accreditations

- Relevant coaching, training, learning & development, customer service or financial services qualification desirable, or equivalent practical experience.
- Experience of coaching, mentoring or developing colleagues within a Contact Centre or customer-facing environment.
- Good understanding of quality assurance, customer service and performance standards.
- Good understanding of customer vulnerability, complaints, risk and regulatory customer outcome requirements.
- Maintain all required T&C, regulatory and internal competencies applicable to the role.

Skills

- Strong coaching, mentoring and colleague development capability.
- Strong observation, call evaluation and quality assurance skills.
- Ability to provide clear, constructive and motivating feedback.
- Ability to identify root causes behind errors and performance gaps and develop targeted coaching interventions.
- Strong understanding of customer experience, service excellence and meaningful customer conversations.
- Good understanding of customer vulnerability, risk, compliance and fair customer outcomes.
- Ability to interpret quality results, CSAT, complaints, errors and customer feedback to identify development priorities.
- Strong communication, listening and interpersonal skills.
- Ability to build colleague confidence, knowledge and capability while appropriately challenging performance.
- Strong problem-solving skills with the ability to provide effective real-time and escalation support.

Job Holder Signature