THE CAMBRIDGE BUILDING SOCIETY

Branch Relationship Manager

KEY INFORMATION

Role: Branch Relationship Manager

Reports to: Customer Experience Manager

Grade: 4

PURPOSE

To lead and develop a high-performing branch team that delivers exceptional member experiences, sustainable business growth and strong operational and risk standards.

The role will build meaningful relationships with members and the local community, develop colleague capability and ensure the branch plays an active role in growing the Society's presence within its local area.

CRITICAL SUCCESS FACTORS

Delivery of agreed branch growth, customer and performance objectives.

Consistently strong member experience and customer outcomes.

High-performing, engaged and competent colleagues.

Effective colleague coaching, T&C and performance management.

Growth in new and existing member relationships and improved customer retention.

Strong and visible branch presence within the local community.

Productive relationships with local professionals, businesses, schools and community organisations.

Strong operational, risk and regulatory standards.

Effective talent development and succession planning.

Continuous improvement in branch performance, service and ways of working.

BEHAVIOURS

Members First – puts members at the heart of branch decisions and creates meaningful customer relationships.
Exceed Expectations – leads the team to consistently deliver exceptional service and customer outcomes.
Make It Happen – takes ownership of branch performance and turns opportunities into action.
Better Together – creates an inclusive team environment and develops colleagues to succeed.
Embrace Improvement – challenges existing ways of working and looks for opportunities to improve and grow.
Respect Always – leads with integrity, fairness and professionalism and sets the standard for others.

Main Duties Within Role

- Provide effective day-to-day leadership and accountability for the branch, creating a positive, customer-focused and high-performing culture.
- Lead colleague Training & Competency (T&C) requirements, including observations, coaching and ongoing competency development.
- Manage individual and branch performance, using agreed MI and KPIs to identify opportunities, address performance gaps and deliver agreed objectives.
- Drive branch growth, proactively identifying opportunities to attract new members, deepen existing relationships and retain customers.
- Coach and mentor colleagues to build confidence, capability and consistently high standards of performance.
- Champion meaningful customer conversations, ensuring colleagues understand customers' wider financial needs and provide appropriate support and solutions.
- Build strong, long-term customer relationships, creating reasons for members to return to and recommend the Society.
- Develop the branch's presence within the local community, building relationships with local professionals, businesses, schools, community groups and other relevant organisations.
- Proactively organise and participate in networking, community, financial education, local marketing and branch events to raise awareness and generate new relationships and business opportunities.
- Take accountability for member acquisition and retention, ensuring opportunities and customer relationships are proactively followed through.
- Maintain strong risk, regulatory and operational standards, ensuring colleagues understand and consistently follow required policies, procedures and controls.
- Ensure consistently high service quality and customer outcomes, addressing service issues and identifying opportunities to improve the customer journey.
- Develop colleague capability and identify future talent and succession opportunities, supporting colleagues with their development and career progression.
- Drive continuous improvement within the branch, using customer feedback, colleague insight and performance information to improve ways of working.
- Work collaboratively with the Customer Experience Manager and wider teams to deliver Society priorities.
- Undertake any other duties and responsibilities that reasonably fall within the scope of the role.

Qualifications & Accreditations

- Relevant leadership, management or financial services qualification desirable, or equivalent practical experience.
- Experience of leading, coaching or developing colleagues within a customer-facing environment.
- Good understanding of relevant financial services regulatory requirements and customer outcome expectations.
- Maintain all required T&C, regulatory and internal competencies applicable to the role.
- Good public speaking, networking and relationship-building skills, with experience representing the organisation at local community and business events, developing relationships with local professionals and businesses, and promoting the Society within the community.
- Good interpersonal and people leadership skills, with the ability to engage hearts and minds, build trust, inspire colleagues and foster a high-performing, customer-focused team culture.

Skills

- Strong leadership, coaching and people development capability.
- Commercial awareness with the ability to identify and convert business growth opportunities.
- Strong customer relationship-building and meaningful conversation skills.
- Ability to build effective community, professional and local business relationships.
- Strong performance management skills with the ability to use MI and KPIs to drive improvement.
- Good understanding of operational risk, controls and regulatory responsibilities.
- Strong communication, influencing and interpersonal skills.
- Ability to motivate colleagues and create an engaged, accountable team culture.
- Strong planning, organisation and prioritisation skills.
- Proactive and confident approach to networking, community engagement and local business development.

Job Holder Signature