

BEHAVIOUR AND COMPETENCE INDICATORS

Group Manager

Behaviour and competence	Score
Level 1	150
Level 2	50
Level 3	- 50
Level 4	- 100

Positive indicators:

- Proactively instigates change and takes the lead on implementing change
- Challenges inefficiencies and comes up with new ideas
- Has a highly motivated team who are able to prioritise initiatives and make things happen
- Spends time with team and invests time in their development. Full development plans in place for all. Coaches and develops team as appropriate. Shares expertise
- Gets team together regularly to discuss ideas and coaches/empowers them to take ideas forward
- Strong influencing skills, with evidence of tenacity and resilience
- Leadership skills and leading by example particularly in the face of strong challenges such as Savings Migration and high level of IFA processing earlier in the year
- Positive attitude which inspires others

Level 1 – Must show strong evidence of the above behaviours

Level 2 – Must show evidence in most of the above behaviours

Negative indicators

- Resistant to change and inability to cope with it. Clings on to the past
 - Poor leadership and management skills leading to an ineffective team and poor results
 - Lack of development and coaching plans
 - Poor staff morale
 - Reactive approach. Does not inspire confidence
 - Prepared to accept the “status quo” and inability to challenge
- Negative attitude. “Done to” rather than “In control”.

Level 3 - Demonstrates evidence of some of the above behaviours

Level 4 – Demonstrates evidence of most or all of the above behaviour

Branch Manager

Behaviour and competence	Score
Level 1	150
Level 2	50
Level 3	- 50
Level 4	- 100

Positive indicators:

- Proactively instigates change and takes the lead on implementing change
- Proactively engages team in continuously identifying and driving improvements
- Coaching team around how to enhance service delivery and business results
- Proactively driving direct business and looking for new opportunities
- Highly motivated team with full development plans in place for all. Spends regular time with team to develop and coach
- Appropriate actions taken for any poor performers in the branch eg coaching plans/IPP/IA/Disciplinary etc
- Low level of customer complaints
- Customer focused – understands needs and encourages team to see things from customer perspective
- Positive attitude particularly in the face of the adversities of Q1 (high processing volumes, Savings Migration etc)
- Takes responsibility for solving problems. Does not constantly refer to GM

Level 1 – Must show strong evidence of the above behaviours

Level 2 – Must show evidence in most of the above behaviours

Negative indicators

- Resistant to change and inability to cope with it. Clings on to the past
- Poor leadership and management skills leading to an ineffective team and poor results
- Poor time management and inability to prioritise
- Looks for excuses for poor performance
- High staff turnover and absence levels (possibly)
- Negative attitude
- Reactive rather than proactive
- High level of customer complaints
- Poor staff morale

Level 3 - Demonstrates evidence of some of the above behaviours

Level 4 – Demonstrates evidence of some or all of the above behaviours

Registered Mortgage Adviser

Behaviour and competence	Score
Level 1	150
Level 2	50
Level 3	- 50
Level 4	- 100

Positive indicators

- Supportive of the Branch Manager eg volunteering to carry out training activities, completing returns etc
- Use of initiative eg coming up with ideas, putting forward workable suggestions to problems
- Contributes to team effort, not just focusing on own work
- Strong interpersonal skills with evidence of good influencing
- Positive attitude particularly in coping with the difficulties and high work volumes in Q1
- Appropriate prioritising
- Makes a conscious effort to learn and develop
- Good rapport with customers and demonstrates understanding of their needs
- Takes responsibility to solve problems

Level 1 – Must show strong evidence of the above behaviours

Level 2 – Must show evidence of most of the above behaviours

Negative indicators

- Poor attitude with regular “moaning and whingeing”
- High error rate
- Negative impact on colleagues
- High short term sickness
- Lateness, working to rule, not prepared to put themselves out when branch under pressure, especially in Q1
- Inability to cope with/accept change
- Lack of ownership for own work, looking for excuses as to why haven’t performed.
- Does not take responsibility for problem solving

Level 3 - Demonstrates evidence of some of the above behaviours

Level 4 – Demonstrates evidence of some or all of the above behaviours

Customer Service Assistant

Behaviour and competence	Score
Level 1	150
Level 2	50
Level 3	- 50
Level 4	- 100

Positive indicators

- Professional approach, polite and courteous at all times to customers. Recognises customer needs and cross-refers as appropriate
- Positive response to change and appropriate communication to customers of change eg Savings Migration
- Willingness and keenness to help both customers and colleagues
- Use of initiative and being proactive eg coming up with ideas and suggestions without being asked.
- Contributes to team effectiveness and does not just concentrate on own work
- Positive attitude particularly in coping with the difficulties and high work volumes in Q1
- Takes responsibility for solving problems

Level 1 – Must show strong evidence of the above behaviours

Level 2 – Must show evidence of most of the above behaviours

Negative indicators

- Poor attitude with regular “moaning and whingeing”
- High error rate
- Negative impact on colleagues
- High short term absence
- Lateness, working to rule, not prepared to put themselves out when branch under pressure, especially in Q1
- Inability to cope with/accept change
- Lack of ownership for own work, looking for excuses as to why haven’t performed. Readiness to blame others
- Does not take responsibility for problem solving

Level 3 - Demonstrates evidence of some of the above behaviours

Level 4 – Demonstrates evidence of some or all of the above behaviours