ROLE PROFILE FOR RELATIONSHIP OFFICER (RO) - CONTACT CENTRE

Job Information

Job Title: Relationship Officer – Contact Centre
Department: Customer Experience
Reporting To: Senior Manager – Contact Centre
Employment Type: *Full time*

Job Purpose

To provide high-quality, consistent, and responsive customer service across multiple channels including inbound and outbound calls, digital platforms, and social media. The Relationship Officer ensures accurate query resolution, effective complaint handling, compliance with regulatory requirements, and identification of cross-selling opportunities, thereby contributing to enhanced customer satisfaction, operational efficiency, and business growth.

Key Roles and Responsibilities

1. Customer Service Delivery & Productivity

- Attend to customer inquiries and requests through voice calls, live chat, WhatsApp, email, and social media platforms in accordance with assigned shifts.
- Deliver timely, professional, and courteous customer service in line with defined Service Level Agreements (SLAs), Average Handle Time (AHT), and response time targets.
- Effectively manage workload and time to achieve productivity, utilization, and occupancy targets.
- Resolve customer inquiries at first point of contact where possible using approved systems, tools, and procedures.
- Educate customers on Bank products, services, features, processes, and digital channels to improve understanding and correct usage.
- Identify and accurately escalate complex issues and complaints following established escalation procedures.
- Capture, document, and escalate customer feedback and service improvement opportunities, acting as a positive brand ambassador.

- Ensure strict adherence to internal policies, procedures, and regulatory requirements including KYC, data privacy, confidentiality, fraud prevention, and protection of customer funds.

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2. Quality Assurance, Sales Support & Continuous Improvement

- Identify upselling and cross-selling opportunities during customer interactions and refer qualified leads in line with Bank guidelines.
- Accurately record all customer interactions in the CRM or approved data capture systems to support tracking, reporting, and analysis.
- Achieve high First Contact Resolution (FCR) through effective use of systems, knowledge bases, and standard operating procedures.
- Participate in Contact Centre trainings, refresher sessions, coaching, and knowledge-sharing forums.
- Complete mandatory organizational and Contact Centre e-learning programs and assessments within set timelines.
- Meet or exceed Quality Assurance (QA) assessment standards and implement feedback from coaching sessions.
- Actively contribute ideas for process, product, and service improvements.

Key Performance Indicators (KPIs)

- Customer Satisfaction (CSAT) scores
- Quality Assurance (QA) scores
- First Contact Resolution (FCR)
- Average Handle Time (AHT)
- Service Level and response time achievement
- Accuracy and completeness of CRM documentation
- Compliance with internal policies and regulatory requirements

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Minimum Qualifications and Experience

- Bachelor’s degree in business, Communication, Marketing, or a related field (preferred)
- Previous experience in Customer Service, Contact Centre, or Banking Operations is an added advantage

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Skills and Competencies

- Excellent verbal and written communication skills
- Strong customer service orientation and problem-solving ability
- Ability to identify upselling and cross-selling opportunities
- Strong negotiation and conflict management skills
- Ability to work effectively under pressure in a high-volume environment
- Strong multitasking and time management skills
- Proficiency in computer applications, including CRM systems and Microsoft Office
- Good typing speed and ability to navigate multiple systems simultaneously
- Team player with a positive attitude and willingness to support colleagues

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Work Environment

- Shift-based, high-volume Contact Centre environment
- Multi-channel operations requiring flexibility and adaptability
- Performance-driven and customer-focused setting

Mandatory Training Requirements

- Induction and rotational training across Branch and Bank operations
- Call handling and telephone etiquette training
- Customer Service training
- Quality Assurance and Performance Management training
- Know Your Customer (KYC), Anti-Money Laundering (AML), and Suspicious Transaction Monitoring (STM) training
- Fraud Prevention training
- Product and Systems training
- PC and Keyboard skills training

Approval & Sign-Off

- Name of Employee: ____
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- Designation: ____
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- Signature: ____
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- Date: ____

- Name of Line manager: ____
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- Designation: ____
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- Signature: ____
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- Date: ____

If you believe you can clearly demonstrate your abilities to meet the criteria given above, please submit your job application cover letter along with a detailed resume, copies of the relevant certificates and testimonials in a single PDF file format, quoting the respective Job title or Ref no. in the subject field to **TZRecruitment@equitybank.co.tz** by **Friday 22nd May 2026**

Only short-listed candidates will be contacted.

Equity Bank is an equal opportunity employer. We value the diversity of individuals, ideas, perspectives, insights and values, and what they bring to the workplace.

By submitting your application, you consent to Equity Bank Tanzania Limited collecting and processing your personal data strictly for recruitment, selection, and, where applicable, employment purposes. Equity Bank Tanzania Limited will process your personal data in accordance with the Data Protection and Privacy Act, Cap 97, and its Data Privacy Policy. Your personal information will be treated with the highest level of confidentiality and will not be shared with unauthorized third parties, except where disclosure is required by law or regulatory obligation".