

# A Day in the Life of a Senior Consultant

LUCY: Hi my name is Lucy - I'm a Senior Consultant at the George Street store in Sydney.

When I'm on a morning shift at the store, I typically arrive at about 7.15am and wait for my other colleagues to arrive before entering the store. We'll get the store ready for the day, do a start of day procedure, process any envelopes that have been deposited the day before and we'll also plan our diaries for the day.

We'll get together at the first opportunity and have a huddle - so we'll discuss what happened the day before and our plans for the day ahead. We'll have a look at the Sprind which is the Management Information telling us how our performance is to date in the quarter, and just review what the focus is going to be for the day. We'll also share any best practice ideas that we've got with each other. So I might have anywhere between 3 to 5 maybe appointments booked in during the day. I also might see some walk-in customers if I'm available for them.

I'll introduce myself and sit down, and just build rapport and get to know them a little before taking them through the structured customer review tool process. A typical customer meeting might last anywhere from between half an hour to an hour, dependant on what the customer has come to see me for.

With being a Senior Consultant my main focus is home loans. I'll meet with my Manager usually every day and we'll have a quick chat really with him focusing on what I need to do that day and my performance from the day before.

Most days I will take some time on the Meeter Greeter role and I'm usually on there for about an hour to an hour and a half. I'll greet the customers as they come into the store and give them a store tour and make them an appointment or get them to take a seat while they wait for an available colleague.

So we get a lunch break and it's usually 45 minutes and I usually take that opportunity to get out and about in the city if I can here in George Street and get some sunshine.

So frequently, I can be required to do transactions for customers - mostly deposits, withdrawals and transfers. It is a good opportunity to have conversations with customers and maybe get leads from that.

So if I've started at 7.15am then I'll leave about 4.30pm. Before I leave I'll send an email to my Manager and all of my colleagues just notifying them of all the sales I've done that day. If I'm starting later in the day and I'm actually closing the store, about half an hour before we finish we'll just go through our end of day procedures and get the store ready to close, and then we'll all leave together.