

Customer Services Advisor

About the organisation

Age UK Lincolnshire is an independent local charity and a valued member of the Age UK brand partnership. We are a dynamic, forward-thinking, and welcoming organisation, dedicated to supporting over 6,000 people across the county every month. With offices and retail outlets throughout Lincolnshire, we offer a wide range of services, social groups, and activities designed to help older people stay independent, active, and enjoy a fulfilling later life.

Our vision – **a world where older people flourish** – is delivered in the pursuit of our strategic priorities and values:

To improve the lives of older people

Caring & Understanding

To increase our organisation's financial sustainability and contribution to the local economy

Dedicated & Passionate

To be leaders in providing high quality services and achieve customer excellence

Dignity & Respect

To be a partner of choice

Independence

To be an employer of choice for staff and volunteers

Compassionate

We're a growing organisation with over 260 dedicated employees working across 19 departments, supported by more than 200 passionate volunteers. As we continue to expand, we're looking for talented individuals who share our vision and values to join our team. If you're inspired by our mission, aligned with our strategic priorities, and committed to making a difference in later life, we'd love to hear from you.

Our recruitment and selection process

To ensure a fair and consistent approach, all candidates must complete our application form we do not accept CVs. The form is designed to capture key information about your employment history, qualifications, and skills gained through work or education.

We encourage applicants to refer closely to the job description and person specification when completing their application. This helps demonstrate your understanding of the role and how your experience aligns with our requirements.

Once the job advert closes, applications are reviewed by the hiring manager for shortlisting. In some cases, applications may be considered before the closing date if we receive a high volume of interest.

Interview Process and Reasonable Adjustments

At Age UK Lincolnshire, we aim to make our interview process as welcoming, fair, and accessible as possible.

If your application is shortlisted, you will be invited to attend an interview, which may be held in person or via video call (Microsoft Teams) depending on the role and circumstances. During the interview, we'll explore your experience, skills, and alignment with our values and the requirements of the role.

We are committed to ensuring that all candidates have equal access to opportunities. If you require any reasonable adjustments to support you during the recruitment or interview process; such as accessible formats, additional time, or alternative arrangements please let us know when you are invited to interview. We will do our best to accommodate your needs.

Job Description

Job title:	Customer Services Advisor
Department:	Corporate Services
Location:	Office based (36 Park Street, Lincoln LN1 1UQ)
Hours of work:	35 hours per week
Contract:	Permanent
Responsible to:	Corporate Services Director
Job purpose:	To provide a warm, professional and compassionate first point of contact for customers contacting Age UK Lincolnshire in person, by phone, email or webform. The post holder will listen carefully, identify the nature and level of need, and support each customer to access the most appropriate service, information or onward support. This is not a switchboard role; enquiries may range from simple requests and transfers through to complex or distressing situations where people are unsure what help they need.

Key Responsibilities:

Customer Contact & First Response

- Act as a responsive and professional first point of contact for customers reaching Age UK Lincolnshire face to face, by telephone, email or webform.
- Manage a varied and often high volume of customer contacts, ensuring each person is listened to, treated with dignity and responded to appropriately.
- Recognise that customers may be contacting the organisation at a point of uncertainty, anxiety or crisis, and respond with patience, empathy and clear communication.
- Distinguish between straightforward enquiries, such as payments or simple transfers, and more complex situations where a customer may need further exploration, reassurance or referral.
- Maintain a calm, welcoming and safe environment for visitors and customers attending Park Street.
- Remain alert to safeguarding concerns and follow organisational procedures to escalate concerns appropriately.

Assessment, Triage & Signposting

- Ask appropriate, sensitive questions to understand what the customer needs, particularly where the customer is unsure what support is available or what help to ask for.
- Use knowledge of Age UK Lincolnshire services to guide customers to the most appropriate internal service, team or member of staff.
- Provide clear and accurate signposting to external organisations or agencies where the customer's needs sit outside Age UK Lincolnshire's services.
- Identify when a customer contact requires escalation, urgent attention or a more specialist response, and act promptly in line with organisational procedures.
- Maintain up-to-date knowledge of services, referral routes and sources of support relevant to older people, carers and people at risk.

Administration & Data

- Record customer contacts accurately and promptly, including the nature of the enquiry, action taken, referrals made and any required follow-up.
- Use customer contact systems, databases, email, Microsoft 365 applications and digital telephony systems confidently and in line with data protection requirements.
- Support the monitoring of customer contact volumes, themes and enquiry types to help the organisation understand demand and improve service access.
- Provide administrative support linked to customer access, referrals, appointments and service information.

Service & Community Support

- Supporting coordination and promotion of activities and classes run within Park Street Activity Centre
- Promoting services, events and activities

Employee Responsibilities

Personal Development:

- Take responsibility for identifying and meeting their own job-related development needs through regular one-to-ones and annual appraisals.
- Engage fully in the appraisal process, including agreeing organisational, team and personal objectives with their Line Manager.
- Complete all mandatory and statutory training as required by the organisation.

Health and Safety:

- Maintain a safe, secure, healthy and supportive working environment.
- Work in line with Age UK Lincolnshire's Health and Safety Policy to protect their own health and safety and that of others.

General:

- Work collaboratively as part of a "One Team" approach, supporting colleagues across the organisation to achieve the best outcomes for older people.
- Maintain confidentiality and comply with data protection requirements in relation to customers, volunteers and staff.

- Promote and protect the organisation's reputation within the community and with partner organisations.
- Communicate clearly, cooperate with colleagues and uphold teamwork values.
- Act with integrity at all times, declaring conflicts of interest and reporting concerns such as bribery or corruption.
- Report any concerns or wrongdoing confidentially in line with the whistleblowing policy.
- Follow all organisational policies, procedures and rules at all times.
- Take responsibility for your own health, safety and welfare, and that of others.
- Undertake any other duties reasonably required by management.
- Act in a flexible, approachable, professional and compassionate manner.
- Remain alert to safeguarding concerns and take appropriate action.
- Be open, honest and transparent; raise issues or mistakes promptly and appropriately.

Person Specification

E	Essential	D	Desirable	A	Application	I	Interview
---	-----------	---	-----------	---	-------------	---	-----------

Experience

Experience of handling customer enquiries face to face, by telephone and in writing, including contacts that require empathy, judgement and appropriate referral.	E	A/I
Confident using IT systems including customer databases, Microsoft 365 applications, email, webforms and digital telephony systems, with training provided where required.	E	A/I
Understanding of confidentiality and data protection requirements, including the importance of recording, sharing and escalating customer information appropriately.	E	A/I
Able to record information accurately and manage competing customer contacts while maintaining confidentiality and attention to detail.	E	A/I

Knowledge

An excellent communicator, with the ability to listen actively, ask appropriate questions, explain information clearly and adapt communication style to suit the customer's needs.	E	A/I
Ability to use judgement to identify the nature and urgency of customer enquiries, including when to reassure, signpost, transfer, refer or escalate.	E	A/I
Understanding and appreciation of the needs of older adults, carers and people at risk, including those who may be anxious, distressed or unsure what support they need.	E	A/I
Awareness of the functions of Age UK Lincolnshire services and support, or the ability to quickly learn and apply internal referral routes.	D	A/I

Education & Qualifications

Good standard of general education, including the ability to communicate clearly and accurately in writing.	E	A/I
Willing to undertake appropriate training and development.	E	A/I
Evidence of training and ongoing development.	D	A/I
Current First Aid qualification.	D	A/I

Experience and knowledge of working in the voluntary sector, supporting and working alongside volunteers.	D	A/I
---	---	-----

Personal Qualities

Able to build rapport quickly with a wide range of people, including customers who may be distressed, vulnerable or unsure how to explain what they need.	E	A/I
Able to remain calm, professional and compassionate when dealing with sensitive, complex or emotionally difficult customer contacts.	E	A/I
Warm, approachable and professional	E	A/I
Positive, practical and solution-focused, with a willingness to help customers and colleagues in a calm and professional way.	E	A/I
Ability to work effectively as part of a team, with the initiative to work alone when required.	E	A/I
Willing to accept instruction and responsibility.	E	A/I
Good organiser and timekeeper.	E	A/I
Flexible in approach to changing customer demand and service priorities.	E	A/I
Able to support occasional service requirements outside normal working patterns where agreed in advance.	D	A/I
Good local knowledge of services for older people.	D	A/I

Additional Information

Probation Period

All employees at Age UK Lincolnshire are subject to a six-month probationary period. This allows both you and the organisation time to ensure the role is the right fit, and to provide support and feedback as you settle into your position. During this period, performance, conduct, and overall suitability for the role will be reviewed in line with our policies and values.

DBS (Disclosure & Barring Service)

This post requires an enhanced DBS check (adult's barred list) – check which level and edit accordingly.

Conditions of Employment

- Receipt of two satisfactory references (one must be a professional reference from your current or most recent employer; neither may be related to you)
- Proof of your right to work in the UK (please visit <https://www.gov.uk/prove-right-to-work> to find out what documents we can accept as proof of identity)
- A satisfactory enhanced certificate issued by the Disclosure and Barring Service (please visit <https://www.gov.uk/government/publications/dbs-identity-checking-guidelines/id-checking-guidelines-for-standardenhanced-dbs-check-applications-from-1-july-2021#group-1-primary-identity-documents> to find out what documents we can accept as proof of identity)

To find out more about this role please email HR@ageuklincolnshire.org.uk or call 01522 696 000 and ask to speak to a member of the HR team.