

Job Description

Customer Services Advisor

Responsible to: *Senior Customer Service Advisor*

Brief overview of the role:

This role is part of a team providing the first point of contact for the organisation assisting people with their enquiries, providing information, signposting and resolving queries efficiently over the phone and via email.

Service delivery:

- To put older people at the heart of service delivery and ensure an excellent customer journey.
- Answer the, 0800 phone line in a professional, timely and friendly manner and provide relevant information to the caller, when required.
- Read, action, and respond to emails sent to the generic Information @ email and use the agreed systems to show if email is in progress or completed.
- Refer or signpost enquirer to the relevant onward resources.
- Keep abreast of the latest information relevant to older people.
- Maintain and update the internal database system e.g. the ARC as an organisational-wide resource as required.
- Fact check information to ensure it is up to date, reliable and accurate.
- Share relevant information and updates effectively and promptly with relevant staff/services in the wider organisation as required.
- Know the difference between information and advice, and ensure correct referrals and signposting are made for internal and external support.
- Maintain accurate notes to record client/enquirer interaction and information provided on our Customer Relationship Management System (CRM) or as directed by the Manager.
- Understand and gain appropriate consent during interactions.
- Be a proactive part of the wider team, working together to develop and improve systems, processes and workflows.
- Consider and take part in other training opportunities, on top of the role's mandatory training.

Governance:

- To adhere to all health and safety, and legal requirements in line with AUKWSBH policies and procedures including monitoring and taking appropriate, prompt action to ensure compliance.
- To ensure effective leadership in relation to compliance with statutory and organisational safeguarding policies and procedures.
- To ensure data and administrative processes are adhered to in line with AUKWSBH policies and legislation of the General Data Protection Regulations (GDPR).
- To regularly and accurately update Charity Log and provide statistical and monitoring information as required.
- To attend relevant and mandatory training as required.
- Monitor hazards and risks and implement relevant organisation processes including but not restricted to: Health & Safety, HR, Information Governance and GDPR and reputational risk.

- To help deliver the objectives as set out in the organisational strategic plan.
- To adhere to all other organisational policies and procedures.

Key contacts and relationships:

Information and Advice team colleagues including volunteers, colleagues across the organisation, other relevant partner as required.

Equality, diversity and inclusion:

AUKWSBH is committed to anti-discriminatory policies and practices. It is essential that the post holder makes a positive contribution to their promotion and implementation.

Scope of job description

This job description reflects the immediate requirements and responsibilities of the post. It is not an exhaustive list of the duties but gives a general indication of work undertaken which may vary in the light of changing demands and priorities. Substantial changes will be carried out in consultation with the postholder.

Person Specification – Customer Services Advisor

Experience	Essential	Desirable
Experience of working or volunteering with older people.	✓	
Sound experience of working in a call centre or similar environment with up-to-date knowledge of IT and telephone systems.	✓	
Ability to proactively seek out information to resolve client enquiries.	✓	
Ability to work effectively as part of a team to deliver a quality customer service.	✓	
Understanding of legal obligations surrounding Customer Service provision such as consent and GDPR.	✓	
A sound understanding of safeguarding and when to escalate.	✓	
Knowledge/qualifications	✓	
An understanding of and interest in older people, their situations, and the opportunities they may want and/or need.	✓	
Knowledge of the local community, third sector and any other groups, organisations, and services for the benefit older people.	✓	
Skills		
A clear, professional, and friendly phone-manner, and similar tone when writing emails.	✓	
Ability to deal with queries promptly and efficiently.		
Excellent wider communication skills, verbal and written with the ability to communicate well and work effectively as a team.	✓	
Good computer skills including using main Microsoft packages, as well as experience with different IT systems.	✓	
Attention to detail and commitment to high customer service levels.	✓	
Other requirements	✓	
Commitment to AUKWSBHs vision, mission, and values.	✓	
Ability to travel as required to deliver job. This is an essential car users post. Proof of appropriate insurance cover, including business use, will be requested.	✓	
Understanding of and adherence to organisational Code of Conduct, supporting positive change across the charity.	✓	