

JOB TITLE:	MEMBER & CUSTOMER SERVICES ADVISOR
JOB HOLDER:	
DATE UPDATED:	FEBRUARY 2024
REVISION (HR Office Use):	

1 MAIN PURPOSE OF THE JOB

- To effectively respond to enquiries from members, employers and customers, ensuring a first class and personalised experience is delivered.
- To deliver exceptional customer service, whilst maintaining accuracy and professionalism.
- To assist in the conversion of enquiries to membership and bookings for courses, training, qualifications, conferences and events, contributing to increased membership and revenue growth by ensuring all customers are guided through the process smoothly. t

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2 POSITION IN ORGANISATION

- Sits within the Membership Directorate, reporting to the Member & Customer Services Manager

3 DIMENSION & LIMITS OF AUTHORITY

- Works within agreed customer service processes, selecting the right pathways for a range of incoming enquiries, escalating or referring issues where appropriate.
- No line management responsibilities
- Works closely with other departments

4 SKILLS & EXPERIENCE

- Demonstrable experience in a busy and varied customer service role
- Communicates confidently, clearly and concisely both orally and in writing
- Adept at handling a broad spectrum of enquiries dealing with personal information in a sensitive, inclusive and professional manner
- Able to deal confidently with people at all levels and develop positive working relationships with team members, colleagues and other departments
- Excellent telephone call handling skills including questioning, probing, listening, establishing rapport, matching and closing
- Ability to work as a member of a team, managing and prioritising a busy workload and demonstrating a flexible attitude to respond to changing priorities.
- Excellent administrative skills, with strong attention to detail and the ability to deliver accurate, high quality work within well-defined processes and procedures
- Ability to work closely and collaboratively with other departments, to identify and action the right support for customers
- Thinking creatively and independently, troubleshooting and resolving problems within agreed frameworks to deliver the best service possible.
- IT literate: Proficient in various computer systems including Microsoft Office and Adobe Acrobat, CRM software and web applications, with an aptitude for learning new IT systems quickly and competently

Member and Customer Service	85%
<ul style="list-style-type: none"> • Work collaboratively with team colleagues and other internal and external contacts to achieve department targets/KPIs and provide a consistently high level of service in line with best practice, internal processes/procedures and the values framework. • Providing the first touch point into the organisation for clients, customers, members and supporters who wish to engage with CIOB. Enquiries can range from membership routes, qualifications, events to CIOB Assist. • Taking ownership of queries through to resolution, or referring to the appropriate department, ensuring a timely response within agreed SLAs, with a view to minimising the transfer of enquiries around the organisation. • Process all new applications for membership in line with agreed SLA's, undertaking an assessment of each individual's experience and academic award. • Keeping abreast of all changes internally and externally that may affect the eligibility of the candidate, and having a comprehensive understanding in order to advise all members professionally and efficiently to grow membership numbers and support the growth strategy and Corporate plan. • Ensuring member certificates and packs are ordered correctly from our external mailing house for new and existing members. • Determine when appropriate whether an enquiry requires financial, direct debit, governance related or mental health support and action accordingly including concessionary applications, retired applications complaints, Anxiety UK referrals and CIOB assist referrals. • Action Member resignations, advising of alternate routes where relevant with the aim of retaining membership where possible. Handle deceased members accounts diligently and with compassion. • Employ problem-solving skills, looking for efficiencies in processes and encourage self-service where appropriate • Address and resolve complaints where possible, reporting and escalating to the Member and Customer Service Manager as appropriate • Ensure details of all enquiries are accurately recorded on the CRM, to ensure records are maintained. • Approach all relevant enquiries with a view to maximising conversions and those members attaining Chartered status, in support of targets laid out in the Corporate Plan. • Contribute to the annual subscription renewal activity, managing a high volume of calls, taking payments, providing advice and actively promoting self service options. • Effectively carry out a range of general Member and Customer Service administration activities as required. 	
Customer Service Improvement	15%
<ul style="list-style-type: none"> • Continuously build, develop, share and maintain in depth product/service knowledge – including feedback from Members and Customers - in order to provide a knowledgeable response to clients and so provide an added value service. 	

<ul style="list-style-type: none"> • Deliver customer satisfaction surveys as required, for benchmarking purposes and to ensure we are constantly improving on our service delivery. • Contribute to the documentation of frequently asked questions for reference and web publication. • Actively contribute to the development and testing of new processes, systems and technology in order to improve the levels of customer service provided. • Put forward ideas to expand membership, implement changes where possible and keep the customer service team working together cohesively. 	
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This is not an exhaustive list of responsibilities involved in the role and the CIOB reserves the right to change the scope of job in line with the operational requirements.

PLEASE ELECTRONICALLY SIGN ON HR SYSTEM

JOB HOLDER:	
DATE SIGNED	
DATE ON WHICH EMPLOYEE COMMENCED UNDERTAKING THIS ROLE	