

JOB TITLE:	MEMBERSHIP EXPERIENCE GENERALIST	
JOB HOLDER:		
DATE UPDATED:	SEPTEMBER 2025	
REVISION (HR Office Use):		

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## 1 MAIN PURPOSE OF THE JOB

The Member Experience Generalist is the first point of contact for members, prospective members and customers, managing a high volume of enquiries across all channels. In addition to resolving queries and providing accurate advice, the role plays a vital part in supporting admissions, processing applications and converting enquiries into memberships, bookings and other revenue generating opportunities. Generalists ensure the smooth handing of all calls, chatbot queries and online requests, whilst safeguarding service quality and enhancing the organisation's reputation.

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## 2 POSITION IN ORGANISATION

Within the Membership Directorate, the role reports to the Membership Experience Manager.

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## 3 DIMENSION & LIMITS OF AUTHORITY

No direct line management responsibilities

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## 4 SKILLS & EXPERIENCE

- Strong customer service or membership services experience, ideally in a high volume, complex environment.
  - Ability to rapidly acquire and apply knowledge across a wide range of organisational functions.
  - Excellent communication skills, with the ability to deliver accurate, empathetic and professional responses.
  - Strong judgement in identifying which queries can be resolved independently and which require escalation.
  - Competence in using CRM systems and digital tools, with meticulous attention to detail for data handling.
  - Resilient, adaptable and capable of managing competing priorities effectively.
  - Collaborative team player with a commitment to continuous learning and professional development.
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## 5 DUTIES &amp; KEY RESPONSIBILITIES

Frontline enquiry handling and call/chat management		40%
<b>1</b>	ACT AS THE FIRST POINT OF CONTACT ACROSS PHONE, EMAIL, CHATBOT AND ONLINE CHANNELS	
<b>2</b>	RESOLVE QUERIES INDEPENDENTLY WHEREVER POSSIBLE BY APPLYING BROAD ORGANISATIONAL KNOWLEDGE	
Admissions and processing		25%
<b>1</b>	ADMINISTER AND PROCESS APPLICATIONS FOR MEMBERSHIP, ENSURING ACCURATE AND TIMELY HANDING OF ALL REQUESTS	
Sales conversions and revenue growth		15%
<b>1</b>	ACTIVELY GUIDE PROSPECTIVE MEMBERS AND CUSTOMERS THROUGH THE JOINING AND BOOKING PROCESSES	
<b>2</b>	CONTRIBUTE TO REVENUE GROWTH BY CONVERTING ENQUIRIES INTO MEMBERSHIPS, TRAINING REGISTRATIONS AND EVENT BOOKINGS	
Triage and escalation		10%
<b>1</b>	USE SOUND JUDGEMENT TO ESCALATE COMPLEX OR TECHNICAL CASES TO SPECIALISTS, ENSURING INFORMATION IS PASSED ON FULLY AND ACCURATELY	
Data integrity and administration		5%
<b>1</b>	MAINTAIN ACCURATE AND UP TO DATE MEMBER AND CUSTOMER RECORDS IN THE CRM SYSTEM	
Continuous improvement and collaboration		5%
<b>1</b>	SHARE INSIGHTS ON RECURRING ISSUES, CONTRIBUTE TO PROCESS IMPROVEMENTS AND SUPPORT THE COLLECTIVE GOALS OF THE MEMBER EXPERIENCE TEAM	

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.

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**BOTH THE EMPLOYEE AND MANAGER WILL ELECTRONICALLY SIGN THE JOB DESCRIPTION ON PEOPLE HR.**