## Account Support Co-Ordinator

**Job specifications -**

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| **Job Title** | Account Support Co-Ordinator |
| **Department** | Customer Operations Team |
| **Location** | Remote (occasional travel) |
| **Reporting to (job title only)** | Customer Operations Manager |
| **Direct reports (job title only)** | None |
| **Job Purpose** | **Priority Key tasks**The primary focus of the role is to build and develop strong relationships with our existing customer organisations and ensure the smooth end to end journey for all customer queries and operational processes. * Providing day to day support to our customer base, undertaking administrative functions to support the customer experience and ensuring that the Account Management team have all the information they require to manage their customer accounts.
* In addition, to inform the Operations team with customer feedback, individual cases of query, complaints, system improvements and to ensure that any required process adjustments that meet customer needs for the service are implemented.
* Daily administrative support to the wider Customer Development Team across all services lines.
* Initial point of contact for customers, where appropriate, for daily case and operational queries – either telephonically or via email. This includes working collaboratively with other departments to support the customer/case query.
* Supporting the completion of the request to mobilise form.
* New customer implementation and support through to, and including, business as usual (BAU) across all service lines (MSK, Preventative service, PTS and EAP) and case management systems (WIP and Caseflow). This includes setting up wellbeing log in details, access to systems, marketing materials, and the information required to input into our system for appropriate set up and running of account. Liaising with the sales and operations teams to facilitate the above.
* Completion of change request forms as appropriate.
* Assist in supporting the provision of management reports to our customers – liaising with the MI and Operations teams to ensure that data and reports are provided in a timely manner and to the right quality.
* Work collaboratively with internal operational stakeholders to ensure the customers’ needs are met on a daily basis.
* Oversight and lead on the daily management of SME customers within the MSK, PTS and EAP portfolio.
* Ensure that all contract renewals are reported and visible to the team.
* Work closely with the finance team to support the payment of overdue customer payments and aged debt.
* Ensure that the customer folders are organised, centralised and remain up to date both for current and potential business – across MSK, PTS and EAP services.
* Timely responses to the customer inbox, emails, voicemails or messages within SLA.
* Reporting on complaint responses and escalating to the Customer Development Team/Account Manager where needed.
* Supporting the Customer Development Team with relevant projects, where applicable.
* Access to appropriate systems to support customer queries, where appropriate.
* Any other reasonable requests.

**Other Tasks Include:*** Identify sales or cross-selling opportunities for the SME portfolio of customer.s
* Supporting teams in ensuring the timely and appropriate provision of critical incidents in line with customer need.s
* Support customers with portal log in issues and basic non-technical queries.
* Support the finance team to answer customer invoice, purchase order queries .

**Marketing*** Support in the production and provision of marketing materials in line with customer need for our existing portfolio.
* Monthly distribution of Wellbeing Topics to external and internal customers.
* Ad-hoc critical service Announcements to external and internal customer.
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**Person specification:**

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|  | **Essential** | **Desirable** |
| **Qualifications** | GCSE Maths, English at C grades and above |  |
| **Experience** | At least 2 years’ experience within a support role that includes direct customer contact in personWorking in a team environment 2 years demonstrable administrative experience | Basic finance knowledge |
| **Skills/knowledge** | Strong organisational and effective telephone manner both internally and externallyExcellent knowledge of MS Word, database solutions including the development of Excel spreadsheetsThe ability to build genuine and effective working relationships with internal colleague and external customers Good attention to detail.Effective planning and organisation skills when under periods of pressurePractical, pragmatic and flexible to both troubleshoot immediate issues and develop long terms solutions to day to day running and delivery of customer service. Ability to work effectively within a home and office environment | Experience of reading contracts and understanding contractual requirements |
| **Specialist Training** |  | NVQ Level 2 business & Administration |
| **Personal competencies and qualities** | Self-starter: work proactively and on own initiativeRespectful and sensitive approach/understanding customer data, medical records and security Confident in identifying where processes could be improved and proactively communicating these to the right internal stakeholdersProfessional and innovativeGood knowledge of health and wellbeing Good sense of humour and team orientated Must be legally entitled to accept and perform work in the UK |   |