Customer Operations Executive

## Job details

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| Job title: | Customer Operations Executive |
| Department: |  |
| Location: | Remote |
| Reporting to: (job title only) | Head of Client Development |
| Direct reports: (job title only) |  |
| Accountable to: (where applicable) |  |
| Responsible to:(where applicable) |  |
| Job purpose: | 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 assigned Account Managers 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 work with operations to ensure that any required process adjustments that meet customer needs for the service. |
| Role and Responsibilities: | **Priority Key Tasks*** + 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 the National Service Centre 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 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 senior team on a weekly basis
	+ 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
	+ Provision of a dashboard to report on measurables within the job description
	+ Timely responses to the customer inbox, emails, voicemails or messages with SLA
	+ Reporting and leading 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 customers
	+ Supporting the appropriate teams in ensuring the timely and appropriate provision of critical incidents in line with customer needs
	+ Support customers with portal log in issues and basic non-technical queries.
	+ Provide system portal demonstrations for Caseflow to customers

**Finance Administration*** + Support the finance team to answer customer invoice, purchase order queries
	+ Provision of accurate administrative forecasting documentation to support monthly forecasting

**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 customers.

**Key Measures- KPI’s**

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| Provision of customer management information reports by the due date 100% of the time |
| 100% customer emails are responded to within 1 working day |
| 100% Account Manager emails responded to within 1 working day |
| 100% customer contractual paperwork raised in accordance with process and on time |
| 100% contract renewals and purchase orders completed and kept up to date  |
| Set up customer mobilisation/accounts 100% on time |

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| Clinical Governance:(where applicable) |  |
| Training and supervision: |  |
| Additional information: |  |

## Person specification

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|  | **Essential** | **Desirable** |
| **Qualifications** | * + GCSE Maths, English, Sciences at C grades and above
 | * + Graduate level qualification within a business, social sciences or management sector
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| **Experience** | * + At least 2 years’ experience within a customer service/support role that includes direct customer contact in person
	+ Customer relationship management
	+ Working in a team environment
	+ 2 years demonstrable administrative experience
 | * + Basic finance knowledge
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| **Skills/knowledge** | * + Strong organisational and effective telephone manner both internally and externally
	+ Excellent knowledge of MS Word, database solutions including the development of Excel spreadsheets
	+ Effective and accurate internal and external written expertise
	+ The ability to build genuine and effective working relationships with internal colleague and external customers
	+ Good attention to detail at all times
	+ Effective planning and organisation skills when under periods of pressure
	+ Practical, 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
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| **Specialist training** |  | * + Business qualification desired
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| **Personal competencies and qualities** | * + Self-starter: work proactively and on own initiative
	+ Respectful 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 stakeholders
	+ Professional and innovative
	+ Passionate about health and wellbeing
	+ Attention to detail
	+ Good sense of humour and team orientated
	+ Must be legally entitled to accept and perform work in the UK
	+ Evidence of values that are consistent with the NHS constitution.
	+ Interpersonal skills to engage and develop working alliances with colleagues and patients.
	+ Evidence of an openness to learning new knowledge and skills.
	+ Excellent verbal and written communication skills
	+ High level of enthusiasm and motivation
	+ Ability to work under pressure
	+ An awareness of and commitment to supporting and facilitating diversity and inclusion
	+ Excellent time management skills
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# Version Control

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| Owner: | Human Resources | Review: | Annually | Classification: | 1 (Proprietary) |
| Author: | Human Resources | Version: | V1.1 | Status: | PUBLISHED |
| Date Published: | 03/12/2019 | Code: | TBC |  |  |

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| Version: | Date: | Summary of Changes |
| V1.1 | 03.12.19 | Document copied onto authorised VHG branded Policy Template (original had no coding) |
| V1.2 | 06/08/20 | Updated to include diversity and inclusion statement |
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