

Position Description

Customer Care Representative

Job family	Corporate and service support (CSS)
Workforce capability framework level	CSS 2/3
Reporting to	
Directly supervising	None
Date prepared	March 2018

Position purpose

This position provides high quality customer service and support to internal and external customers, programs, and projects.

The role:

- Demonstrates exceptional customer service skills including the ability to:
 - show empathy, patience, and confidence;
 - clearly communicate using positive language;
 - embrace and contribute to continuous improvement for providing exceptional customer service;
 - take responsibility for providing exceptional customer service and ensuring the customer's needs and requests are being met by the organisation;
 - be warm, friendly, eager to help, and inviting.
- Ensures the customers' concerns are addressed quickly and in a manner that leaves them feeling good and confident in the ability of Learning Links to meet their needs.
- Maintains comprehensive knowledge of Learning Links Products and Services to be able to provide direct and immediate support and guidance to customers face to face, via email, or on the telephone.
- Ensures all customer documents including invoicing, payments, reports, are accurate and processed as required to meet the customer's needs.
- Ensures the Customer Data Base and accounting systems are used in a way that supports customer needs and Learning Links professionals. This includes entering required customer related information directly into the Customer Data Base for future reference and actions.
- Provides administrative, office, and site management support as required.
- Ensures that any support provided to other teams and internal customers does not impact on providing direct customer support.
- Ensures the physical environment at all centres are maintained and presented in a way that promotes our brand in the best possible way and reflects our high-quality services. This includes ensuring reception areas are clean, safe, and tidy, and attractively display Learning Links promotions and resources.
- Provides Quality Assurance for the intake processes by reviewing the accuracy of the account and opportunity information to ensure it is accurate. This will include checking the accuracy of who gets billed, pricing, bookings, contact data, and the services provided. Provides feedback on errors made to support a reduction in the error rate within the intake process.
- The position follows organisation and team processes and procedures, and suggests and contributes to changes in processes and procedures to improve our ways of working.

Document Control

Completed by: Jennifer Woodrow

Date:

Reviewed by: Simone Montgomery

Date:

Employee sign off and acceptance

I have read, understand, and accept the expectations of the Customer Service Officer Role.

Employee:

Signature:

Date:

The statements within this PD are intended to describe the general nature and level of the work being performed. This is not an exhaustive list of all duties and responsibilities associated with the position. Management reserves the right to amend and change responsibilities to meet business and organisational needs as necessary.

Please print this page only, sign your acceptance, and return this page only to Human Resources at Learning Links

Strategic core requirements

Key responsibility areas	Capability requirements	Performance measures
Sector and organisation purpose and values	<ul style="list-style-type: none"> Working knowledge of a human rights based approach to supporting a person with a learning difficulty and learning disability. and the services provided, the individual and community context, and sector and organisation purpose and values. Applies the approach and values in own work. (L3) 	<ul style="list-style-type: none"> Ensures own behaviour is consistent with Learning Links standards and organisation values. Achieves respect from others in the workplace by clearly demonstrating the importance of the customer service role in making a significant contribution to the organisation. Is respectful, courteous, and friendly in all interactions.
Leadership and teamwork	<ul style="list-style-type: none"> Works collaboratively with team members. Organises own workload. Checks own work and work of others, providing guidance to less experienced staff. Shares knowledge and information with team members. Able to work with minimal supervision, knowing when to escalate issues. (L3) 	<ul style="list-style-type: none"> Demonstrates involvement in and contribution to the organisations and team results and effectiveness. Work is consistently completed to a high standard and quickly. Follows established processes and checks own work to minimise errors. Collaborates with others to make improvements to work processes. Issues are appropriately escalated as required Proactively shares knowledge and information with work colleagues.
Communication	<ul style="list-style-type: none"> Deals with non-routine enquiries. Uses effective listening skills and seeks, provides and/or shares information with people appropriately. Can adapt communication style to meet people's needs. Able to resolve conflict with assistance. Has a network of internal and external contacts relevant to the role. Deals with practical issues presenting and enlists a more experienced person as needed. (L3) 	<ul style="list-style-type: none"> Consistently greets customers in a warm and friendly manner. Communication is clear and concise and demonstrates a comprehensive knowledge of Learning Links Products and Services. Demonstrates effective listening and validation skills when talking with customers and responding to their enquiries. Supports the communication process between professionals and other support staff and clients by providing appropriate information as required to ensure the customer's needs are being met.
Customer relationships	<ul style="list-style-type: none"> Assists customers to address their practical straightforward needs and expectations. Adopts a flexible approach. Has working knowledge of available services. Undertakes communication and liaison with customers. Demonstrates confidentiality and diversity awareness. Provides information and can refer to others. Understands relevant stakeholder relationships and the importance of these. (L2) 	<ul style="list-style-type: none"> Demonstrates a warm, welcoming, and positive approach to existing and potential clients and customers. Is discrete and confidential when dealing with customers and staff. A comprehensive knowledge of Learning Links Products and Services is demonstrated when providing direct support and guidance to customers face to face, via email, or on the telephone. Queries and issues are responded to or appropriately referred on to relevant Learning Links staff.

Key responsibility areas	Capability requirements	Performance measures
Personal accountability	<ul style="list-style-type: none"> Adheres to organisation policies & procedures and all relevant government legislation and standards, including workplace health, safety and wellness responsibility. Identifies quality variations against standards and procedures in own work area. Adopts personal accountability in own role. Uses resources efficiently. Maintains organisation's image and reputation in context of own role. (L2) 	<ul style="list-style-type: none"> Manages own time effectively to get work completed on time and to provide customer responses in a timely manner. Ensures data or information is checked and accurate before being sent or entered into systems. Demonstrates knowledge and application of policies and procedures. Recognises inconsistency and errors in data. Receives positive feedback on interactions with others and workplace behaviour consistent with the values of the organisation
Innovation	<ul style="list-style-type: none"> Appreciates the need for resourcefulness, creativity and adaptability within role boundaries. Open to new approaches. Takes responsibility for continuous improvement and risk mitigation in own work. Resolves routine problems. Suggests changes. (L2) 	<ul style="list-style-type: none"> Participates in and is open to change and improving processes. Gets actively involved in team problem solving. Implements strategies to minimise errors. Acts to correct simple problems and escalates more complex problems as required. Proactive in learning new systems to ensure effective utilisation and optimisation.
Experience and qualifications	<ul style="list-style-type: none"> Equivalent to VET Certificate II in relevant studies or equivalent experience. Is capable across the full range of competencies required. 	<ul style="list-style-type: none"> Shows commitment to ongoing learning and skills development. Attends appropriate training for role. Demonstrated experience in providing direct customer service and managing effective customer relationships.

Functional requirements

Key responsibility areas	Capability requirements	Key performance measures
Service delivery	<ul style="list-style-type: none"> Is proactive in supplying information about services. Sends standard emails and correspondence. Gives high priority to service delivery and demonstrates a service focus. Assists direct service staff with administrative procedures. Provides service to a range of internal and external customers, demonstrating a service focus in all areas. Able to appropriately assist customers based on an understanding of the work area's priorities, and refer more complex enquiries appropriately. 	<ul style="list-style-type: none"> Accurately processes customer payments using various payment methods. For example, Cash, Cards and Hicaps. Provides accounting support including reconciling banking. Creates customer documents (Invoices, payments, paperwork) that are consistently accurate and timely. Produces, edits and formats organisational documents as required. Adheres to confidentiality and privacy requirements and exercises appropriate discretion when dealing with customers and staff.
Work area knowledge and application	<ul style="list-style-type: none"> Undertakes simple as well as sometimes more complex service support work. Checks own work for errors. Verifies data by comparison with the source of entry. 	<ul style="list-style-type: none"> Completes work to expected standards and level of quality. Follows agreed procedures to complete tasks. Checks data with other sources before using to produce work documents.

Developed using the NDS [workforce capability framework](#). Funded by the NSW Department of Family and Community Services.

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Key responsibility areas	Capability requirements	Key performance measures
Information technology and workplace equipment	<ul style="list-style-type: none"> • Uses relevant communications and technology systems. • Able to prepare documents, tables and spreadsheets. • Interrogates and maintains a database. • Able to use accounting software to process invoices, credit notes and payments. • Knowledge of the software and internet procedures relevant to the position. • Uses workplace equipment with minimum supervision. 	<ul style="list-style-type: none"> • Uses customer database efficiently & effectively to: - <ul style="list-style-type: none"> ○ Look up customer information ○ Add & update customer information. ○ Upload documents ○ Create merge documents and labels ○ Create simple queries ○ Generate excel documents from queries ○ Review the intake process and check the accuracy of the account and opportunity information to ensure it is accurate. • Uses Excel to: <ul style="list-style-type: none"> ○ Create well formatted spreadsheets ○ Edit and update spreadsheets created by database and accounts systems ○ Use Sum and simple formulas ○ Use multi-level sorts ○ Produce graphs to display information. • Uses Word to produce documents <ul style="list-style-type: none"> ○ Creates and edits well formatted documents to agreed style standards and templates. ○ Creates and edits tables ○ Creates and edits headers/footers ○ Inserts pictures and other symbols ○ Uses Headings correctly and creates Table of Contents ○ Uses Mail Merge to create letters, labels and emails. • Uses Accounts system effectively and efficiently to: <ul style="list-style-type: none"> ○ Produce invoices ○ Enters and apply payments ○ Checks customer accounts ○ Views and prints receipts, invoices and statements ○ Uses filters to improve work practices • Uses PowerPoint to produce presentations <ul style="list-style-type: none"> ○ Creates and edits well formatted PowerPoints ○ Inserts pictures ○ Runs PowerPoints. • Uses Office 365 to effectively manage workload, including emails and calendars • Identifies technology and equipment problems and addresses problems or escalates issues when required.

Key responsibility areas	Capability requirements	Key performance measures
Reporting, documentation and administration	<ul style="list-style-type: none"> Adheres to reporting, documentation and administrative requirements. Assists others. Maintains appropriate notes and other documentation. Uses relevant business systems to meet reporting and administrative requirements. 	<ul style="list-style-type: none"> Uses office equipment effectively and can train others in their use (eg photocopiers, binders etc) Documents are managed in a way that supports others to locate and use them. This includes using shared directories and not personal file locations. Works with team to implement and maintain effective document management protocols. This includes utilising templates, version control methods, review and approval processes, naming folders and directories, and establishing a document naming convention. Effectively utilises and helps with the currency and accuracy of workplace documents including work instructions, policies and procedures. Minimise the need for and use of hard copy documents if appropriate. Collects data as required to report on customer service effectiveness.