

<b>Position Title:</b>	Customer Service Consultant
<b>Division:</b>	Customer Service Team
<b>Direct Reports:</b>	NIL

### ABOUT NORTHCOTT:

#### Who is Northcott?

Northcott is a not-for-profit disability service provider that works with customers to realise their potential.

As one of Australia's largest not-for-profit disability service organisations, we provide services from metropolitan and regional locations throughout NSW and the ACT. We have more than 85 years of experience and expertise in the disability service industry.

A registered NDIS provider, we employ close to 1000 staff and provide empowering, personalised services to over 13,500 people with disability, their families and carers each year.

#### What do we do?

Northcott provides personalised and dynamic support, delivered by a committed team who will optimise and maximise support and services for every customer.

Our experience and expertise gives confidence to our customers they are in good, trustworthy hands, while our commitment to innovation and pushing boundaries allows us to tackle any challenge currently creating barriers for our customers to reach their potential.

Northcott's diverse range of service offerings and strong community partnerships gives customers easy access to the supports they need or want through a single gateway from our many locations.

#### What is our promise to each customer?

We will work creatively and relentlessly with each customer to unlock, discover and unleash their potential, supporting and empowering them to be the best they can be now and in the future.

Our customers are not numbers, they are unique individuals. We personalise our services to each customer's current and future needs and goals, every single one, to ensure their development and growth.

As advocates for our customer's inclusion, we will empower them with confidence, choice and opportunity so they can live their life, as they choose, in their own way.

### KEY OBJECTIVE OF THE SERVICE/DEPARTMENT:

The customer service team is instrumental to the conversion of general enquiries into Northcott customers. The team will be required to proactively communicate, listen, interpret and match the customer needs to the Northcott products.

The team will be responsible for managing service requests and supporting ongoing efficient service delivery from the customer bookings, staff rostering and resourcing perspective.

### KEY OBJECTIVE OF THE POSITION:

The key objectives of the Customer Service Consultant will be to:

- Work closely with the Individual Plan Advisors to generate qualified sales appointments from warm lead data
- Follow up on leads and set appointments
- Meet KPIs linked to:
  - call volumes
  - appointments generated
  - request for service and service booking/amend turnaround
  - minimum service cancellations
- Attend to all enquiries in a timely, efficient and courteous manner

### PERSON SPECIFICATIONS (SKILLS & KNOWLEDGE)

- Ability to deal with customers in a timely, efficient, friendly and courteous manner
- Positive and professional phone manner
- Enthusiastic and positive attitude
- Excellent written and verbal communication and interpersonal skills
- Ability to cross sell and upsell Northcott services to ensure customers are maximising their Service Agreement.
- Demonstrated initiative and proactive customer service approach to work
- The ability to work effectively both autonomously and as part of a team
- The ability to work efficiently under pressure and manage conflicting priorities
- Ability to problem solve and manage conflict to resolution

### ESSENTIAL QUALIFICATIONS & EXPERIENCE REQUIRED

- Experience with nurturing sales leads for later conversion into appointments
- Clear communication skills
- Experience working towards targets
- Previous customer service experience or sales experience - telemarketing, call centre, or outbound calling desirable
- Previous scheduling, staff rostering, customer bookings or complex diary management experience
- A high level of computer literacy and competency
- A desire to work in the disability sector and uphold Northcott's values
- Either lived experience of disability or knowledge of the disability sector is highly desirable

### DELEGATION LEVEL

- NIL

### CORE COMPETENCIES OF THE ROLE

#### Customer Focus / External Contact

- Answer all customer enquiries, in a courteous and friendly manner
- Update, create and maintain customer records
- Initial assessment of customer's NDIS plan from a customer's funding and Northcott product service perspective
- Effectively communicate with all relevant stakeholders to ensure rostering and booking needs are met within established timeframes

#### Relationship Building

- Build positive relationships with internal and external customers and stakeholders

- Ensure confidentiality and compliance in all customer interactions (internal and external)
- Nurture leads for later conversion into appointments
- Set clear service delivery expectations and provide consistent service
- Support customers to provide positive or negative feedback when required
- Initiate, develop and maintain good working relationships with all stakeholders
- Maintain good working relationships with team members and fellow colleagues
- Ensure adequate handover and support is given when rotating between different rostered areas

### Problem Solving

- Ability to identify problems and apply practical solutions
- Ability to identify high risk issues and escalate accordingly within a timely manner
- Use initiative to prioritise work load in order to meet deadlines
- Ensure decisions are made in line with Northcott's policies, procedures and business rules.
- Proactively contributes to work practice improvement

### Financial Impact

- Ensure staff are forward rostering according to business requirements
- Shift approvals are completed within relevant timeframes
- Show attention to detail ensuring that all quoting and invoicing is completed accurately and within appropriate timeframes
- High attention to detail when setting up and maintaining customer records
- Follow protocol and escalate accordingly when customer accounts are in arrears, or when maximum no show or cancellations have been met
- Ensure customers are serviced in line with their Service Agreement, minimising service cancellations; rescheduling or providing service alternatives

### Time Impact

- Complete all allocated tasks within the targeted timeframe
- Prioritise duties/responsibilities in a manner consistent with service and organisational objectives

### Team Work

- Provide advice and support to fellow team members when requested
- Respect other opinions and be willing to learn from others
- Ability to work autonomously and show initiative to assist others when required
- Work collaboratively as part of team

## DUTIES

The typical duties of this position include:

1. Manage all inbound calls with a high level of customer service by following business processes, capturing mandatory data, referring to reference materials, prioritising customer's requirements
2. Provide follow up to all outstanding enquiries and requests within stated timeframes
3. Nurture customer enquiries into warm leads
4. Maintain customer interest in group training and activity requests
5. Accurately input data and maintain customer profiles, bookings and staff rosters
6. Work with the IPA sales team to capitalise on leads – ensuring optimal handover
7. Communicate Northcott service delivery requirements in setting expectations of each customer
8. Manage emails ensuring all enquiries are responded to within nominated timeframes
9. Ensure essential appointments are confirmed, follow up if required
10. Placing outbound calls to prospective customers in marketing data base

11. Monitor waitlists – contacting customers, sending marketing materials and updating databases accordingly
12. Provide support requiring the exercise of sound judgment, initiative, confidentiality and sensitivity
13. Complete customer file set up and ongoing maintenance to ensure customer records are accurate
14. Process all booking requests that come through via CMS/CRM and service request tools/forms
15. Provide service quotes, issue contracts as applicable and raise invoice request as required
16. Approve all shifts rostered daily
17. Manage customer RSVP's to Northcott events/ workshops
18. Staff service delivery rostering – accommodating customer preferences where possible and prioritising minimum service requirements.
19. Roster resources required for service delivery including interpreters, cars, brokerage agencies
20. Process all service requests, amendments or cancellations for internal and external customers.
21. Ensure effective use of staff capacity – minimising travel between servicing through effective job allocation
22. Manage one off service requests for service, from quoting through to billing
23. Ensure that customers with NDIA plans maximise their contracted Northcott supports monitoring booked services against their plan
24. Ensure booked services are within customers contracted balance and over/under servicing does not occur
25. Ensure staff are rostered to deliver service within their contracted hours
26. Work within a rotating roster between 6am-8pm to provide an after-hours rostering services to customers
27. Provide reports and information required to support other functions of the business
28. General administrative support as required

**This list is indicative only and is subject to change. All Northcott employees are required to comply with any reasonable work requests as directed by their employer from time to time.**

### **NORTHCOTT POLICY AND PROCEDURES**

All Northcott employees are expected to be familiar with and adhere to Northcott policies and procedures. For more information see your manager or refer to the policy and procedures available on the Northcott Intranet.

Employee's Signature

Employee's Name

Date

**Please forward a signed copy to Human Resources.**