JOB DESCRIPTION

Job Title: Customer Relations Officer

Department: Customer Service (Project LEGO)

Main purpose of job:

To contact CAF “Give As You Earn” (GAYE) customers via telephone to identify, obtain and confirm customer information held is accurate.

To deliver efficient and effective Customer Service to existing customers that seeks to anticipate, respond to, and exceed customer expectations at all times.

Innovate and adopt a solution-based approach to resolving any difficulties faced by our customers and finding resolutions for them.

Responsible to: Customer Relations Team Leader

Budget responsibilities: None

Responsible for: None

Key Job Responsibilities:

- Responsible for obtaining the complete customer information required to operate the GAYE scheme efficiently.

- To contact customers via telephone to discuss:
  - Obtain their latest contact details for the administrators who are responsible for managing GAYE at their organisation
  - Where we do not have current contact details, to research the organisation to find these contact details, then find the relevant person at the organisation who manages the customers GAYE account to obtain the required information.
  - For customers who have outstanding GAYE fees / invoices, to request these payments are made and to provide payment methods available setting clear timescales.
  - For relevant customers who have outstanding GAYE payroll reports, request customers to provide the report and support them on the process, setting clear timescales.
For relevant customers who have not migrated onto the GAYE online ‘platform, to provide guidance and support on how to migrate.

To identify with the customer if they work with any Third-Party suppliers (i.e. Payroll provider, Professional Fundraising Organisation) and provide guidance on how to share the information with CAF

- To update databases and maintain excel spreadsheets with all outstanding actions from the customer.
- If no contact with customer from the initial phone call; diarise follow ups and ensure that this is followed up to completion and enters the agreed escalation process where needed.
- To respond to enquiries from customers, in a professional, timely and efficient manner in accordance with departmental standards (SLAs).
- To be pro-active in the suggestion and development of new processes and procedures related to the required work, assisting with the implementation of solutions.
- To achieve personal and team targets as agreed with the Line Manager.
- Maintaining awareness of and complying with relevant CAF policies and procedures that fulfil legal/audit requirements (e.g. Data Protection and CAF’s Complaints Procedure).
- To ensure confidentiality in all matters.
- To carry out other duties as required, to support the team.

**Job Related Competencies**

- A number of years + experience working within an outbound call environment
- High level of accuracy and eye for detail
- Ability to self-manage and adhere to strict deadlines
- Comfortable with asking financial related questions
- Computer literate with MS software, including MS Office and MS Excel

**CAF Values and Behavioural Indicators**

The CAF Values and Behavioural Indicators set out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This is used for the assessment, management and development of performance of all our people across CAF.

Please refer to the link: [CAF values and indicative behaviours](#) for the CAF Values and Behavioural Indicators.
# PERSON SPECIFICATION

**Job title:** Customer Relations Officer  
**Date:** October 2022

<table>
<thead>
<tr>
<th>Attributes</th>
<th>Essential</th>
<th>Desirable</th>
<th>How Evidenced</th>
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<tbody>
<tr>
<td><strong>Experience</strong></td>
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<tr>
<td>• Significant experience within an outbound call environment</td>
<td>✓</td>
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<tr>
<td>• Experience in managing customer expectations and developing customer relationships</td>
<td>✓</td>
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<tr>
<td>• Experience of handling difficult conversations with customers.</td>
<td>✓</td>
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<tr>
<td><strong>Qualifications</strong></td>
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<tr>
<td>• Good standard of basic education</td>
<td>✓</td>
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<td>✓</td>
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<tr>
<td>• NVQ Level 2 or Equivalent</td>
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<tr>
<td><strong>Training</strong></td>
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<tr>
<td>• Customer Service</td>
<td>✓</td>
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<td>• Time Management</td>
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<td>• Telephone skills</td>
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<td>• Good organisational skills</td>
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<td><strong>Specialist Skills/ Ability/Knowledge</strong></td>
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<tr>
<td>• Computer literate with MS software, including MS Office and MS Excel</td>
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<tr>
<td>• Excellent attention to detail</td>
<td>✓</td>
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<tr>
<td>• Ability to self-manage and adhere to strict deadlines</td>
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<tr>
<td>• Proficient in English (Oral and Written)</td>
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<td>• Knowledge of CAF products and services</td>
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<td>• Knowledge of the Voluntary sector</td>
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<td>• Problem solving skills</td>
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<td><strong>Communication</strong></td>
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<tr>
<td>• Competent in communicating with all levels of staff/team player</td>
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<td>• Competent in dealing with complex queries and complaints.</td>
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<td><strong>Personal Qualities</strong></td>
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<td>• Personal drive to exceed targets</td>
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<td>• Demonstrates a positive attitude and ability to motivate self.</td>
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<tr>
<td>• Puts the customer at the heart of everything they do</td>
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<tr>
<td>• Resilient and tenacious</td>
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<td><strong>Prior to Appointment</strong></td>
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*R/E*
<table>
<thead>
<tr>
<th>All posts:</th>
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<tbody>
<tr>
<td>• Credit Check</td>
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<tr>
<td>• Sanctions Check</td>
<td>✓</td>
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<tr>
<td>• Basic DBS Check</td>
<td>✓</td>
</tr>
<tr>
<td>• Employment References</td>
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<tr>
<td>• Medical Clearance</td>
<td>✓</td>
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<tr>
<td>• Right to Work in the UK</td>
<td>✓</td>
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<tr>
<td>FCA Approved Posts:</td>
<td></td>
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<tr>
<td>• Standard DBS Check</td>
<td>✓</td>
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</tbody>
</table>

**Key**

R = References, E = Evidence/Certificates, A = Application, C = Competency Interview, T = Testing/Assessment