![CAF - Charities Aid Foundation logo]

JOB DESCRIPTION

Job title: Customer Service Representative

Grade: B

Department: Customer Contact, Customer Service

Main purpose of the job:

To deliver efficient and effective customer service to existing and prospective customers that seeks to anticipate, respond to and exceed customer expectations at all times. To actively promote CAF's products and services to recognise sales opportunities and to increase new business through sustaining and upgrading the existing customer base.

Responsible to: Team Leader

Budgetary responsibilities: None

Responsible for: None

Key Job Responsibilities

- To respond to enquiries from customers, in a professional, timely and efficient manner in accordance with departmental standards (SLA's) and KPI's
- To pro-actively promote CAF products and services which CAF can offer, in line with enquirer's needs
- To actively recognise and to progress/hand off sales opportunities to the relevant teams to increase business
- To obtain a high level knowledge around the systems, processes and products within the department to the level of being a point of reference for queries, to being able to identity and/or resolve issues and problems
- Develop excellent working relationships with both internal and external customers to extend own network
- Able to communicate articulately to a high level whether verbal or written communication
- To actively participate in positive communication between the Customer Service Teams
- To be proactive in the suggestion and development of new work processes and procedures, assisting with the implementation of solutions
- To participate in the performance management system by giving and receiving feedback, gathering evidence to support performance and behaviour
- Maintaining awareness of and complying with relevant CAF policies and procedures that fulfil legal/audit requirements (eg GDPR and CAF's Complaints Procedure)
- To ensure confidentiality in all matters, and recognise that any breach of this confidentiality will be treated very seriously
- To comply with appropriate data standards

- To carry out other duties as specified by the line manager, to support the team

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.

Date: August 2024

PERSON SPECIFICATION

Job title: Customer Service Representative

Date: August 2024

Attributes	Essential ✓	Desirable ✓	How Evidenced *
Experience Experience in a customer service environment Experience in a managing customer expectations and developing customer relationships (eg Identification of potential cross-selling opportunities, promotion of CAF products, effective complaints handling etc)	✓	✓	A/C/T
Qualifications NVQ Level 2 or equivalent		✓	A/E
Training Customer service Time management Telephone skills Good organisational skills	✓ ✓ ✓	 ✓	A/E/T
Specialist skills/ability/knowledge Computer literate Web literate Proficient in English (oral and written) Knowledge of CAF products and services Knowledge of the voluntary sector	✓ ✓ ✓	 ✓ ✓	A/C/T
Communication Competent in communicating with all levels of staff/team player Competent in dealing with complex queries and complaints	✓	 ✓	A/C/T
Personal qualities Personal drive to exceed targets Demonstrates a positive attitude and ability to motivate self Demonstrates ability to coach staff	✓ ✓	 ✓	A/C
Special conditions Working unsociable hours may be required on occasions		✓	C
Prior to Appointment All posts: • Credit check • Dow Jones check • Basic DBS Check • Employment references • Medical clearance • Right to work in the UK	✓ ✓ ✓ ✓ ✓ ✓		R/E

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