

Role Description and Responsibilities

Role: Customer Retention Advisor

This document outlines the role and responsibility of the Customer Retention Advisor. Whilst this list is as complete as practicably possible, there may be elements not included below that form part of the role that can reasonably be requested of the member of staff as appropriate. This document may also be updated in the future, however this will be communicated with you in writing.

Primary Functions

Task	Description
<p>About the role</p>	<p>To manage the retention of our customer base to ensure that we continue to grow year on year. To provide advice and guidance to customers who express an interest in cancelling or renewing their certification contract; focus being to 'winback' customers expressing a wish to cancel and 'renew' customers at the end of their current certification contract.</p> <p>You will also proactively provide customer feedback data regarding the service provided in order to ensure our customer journey continues to improve and evolve in line with our customer and industry requirements.</p> <p>This includes, but is not limited to:-</p> <ul style="list-style-type: none"> • Handling customer queries via telephone, email, letter and web chat. • Managing customer accounts from initial enquiry through to 'save' or 'cancellation' ensuring a smooth customer journey by reselling benefits of ISO certification to the customer and / or provide solutions to customers to influence them to retain their contract. • Responding to internal reporting requests i.e. providing data and relevant information. • Achieving individual and team targets eg. support ticket turnaround, winbacks and renewal rates. • Problem solving, identifying customer issues and providing solutions within contract terms. • Highlighting inefficient working practices with Manager in order to improve processes and practices to enhance the customer experience and aid the company to work more efficiently. • Maintain a high level of customer service.

Task	Description
Duties	<p>Responsible for representing the company in a professional manner at all times and for maintaining the company CRM records appropriately to accurately reflect customer data and issuing relevant contractual correspondence to clients.</p> <p>This includes, but is not limited to:-</p> <ul style="list-style-type: none"> • Managing customer accounts from their initial enquiry through to resolution. • Ensuring accurate and timely logging of information on CRM to aid in data analysis and reporting. • Ensure cancellation requests are processed accurately and timely, focusing on retention targets, understanding root cause and ensuring appropriate response • Ensure renewals are processed accurately and timely, focusing on renewal targets, ensuring most appropriate product and relevant contract is provided. • Use system process knowledge to handle all queries • Advising clients accurately and honestly on product best for their business through identifying upsell opportunities and passing these through to the sales team. • Ensure clients are issued with accurate relevant information they require • Timely follow up of any outstanding queries
Skills/Requirements	<ul style="list-style-type: none"> • Excellent communicator • Resilient, adaptable, strong organisation skills with the ability to multi-task / prioritise appropriately • Must have proven retention and customer service experience • Problem solving skills with the ability to think on their feet • Work autonomously • Be able to make decisions where necessary to drive performance • Previous B2B experience • Computer literate; previous experience of working with salesforce an advantage • Must be driven to meet targets • Have excellent verbal and written communication skills

Task	Description
	<ul style="list-style-type: none"> • Strong negotiation and improvisational skills • Knowledge of ISO Certification advantageous, but not essential
Company Interests	<p>Use best endeavours to ensure that the Company interests are promoted in the most positive manner.</p> <p>This includes, but is not limited to:-</p> <ul style="list-style-type: none"> ▪ Portraying the Company in a positive way to internal and external parties ▪ Taking steps wherever possible to ensure that the Company maximises sales ▪ Considers Company financial performance when committing to any spend on behalf of the Company