

## Job specification

### Retention & 1st Line Support Advisor

**Reporting To: Customer Operations Manager**  
**Department: Customer Operations - Norwich office**  
**Contract: Full-time, Permanent (Mon-Fri 9am - 5pm)**

**Location: Norwich**

**Salary: £24,000 - £26,000 per annum basic, NOT entry level - min 5 years customer service / admin experience**

**Benefits: Pension, Health Plan, 5 weeks' holiday, plus birthday day off, plus 8 paid Bank Holidays, Holiday Purchase Scheme, Gym discounts.**

#### About us

Operating in the UK since 1993 Citation ISO provides professional consultation and support for Organisations that require a hassle free and cost-efficient route to ISO Certification. We have proudly been delivering internationally recognised Management Systems for almost 30 years, with the aim of 'making businesses better'. Our growth plans are ambitious, and we're part of the private equity owned Citation Group. Our customer base has grown significantly over the past few years and this growth will continue - that's where you come in.

#### About You

##### For this role you will need the following key skills & attributes:

- Previous experience of delivering to targets; with a background in customer service, support or retention.
- You will have a passion for delivering exceptional service to customers and colleagues.
- Motivated and resilient, adaptable, strong organisation skills with the ability to multi-task / prioritise appropriately
- You will love to build great relationships and build rapport easily creating strong relationships with customers and colleagues using a collaborative manner to achieve desired results. Excellent listening and negotiation skills, along with good verbal and written communication
- Natural problem solver and decision making skills
- You will have a high level of attention to detail and commitment to quality
- Can do attitude
- Computer literacy including strong knowledge of word, outlook and excel
- Previous experience of working CRMs advantageous
- Knowledge of ISO Certification advantageous, but not essential

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## Purpose of the role

The primary function of the role is to input renewal contracts at peak times, create cancellation tickets to ensure timely response by the retention team and provide a 1<sup>st</sup> line customer support function to our customers.

Should the query be unable to resolved via the 1<sup>st</sup> Line customer process you will transfer this query to the relevant department team who will essentially act as 2<sup>nd</sup> Line Support and own the customer's query through to resolution.

## Key tasks:

- **Retention email enquiries;** progression of cancellation enquiries workstream / email account to ensure timely response, including creation and distribution of cancellation tickets to team to enable retention team to focus on far more direct customer phone contact and customer winback
- **Renewal email enquiries;** progress of renewal enquiries workstream ie. input of renewal contracts and monitoring of email account to ensure timely response to enable retention team to increase their direct customer phone contact and renewal conversion
- **1st line Customer enquiries;** progression of customer enquiries workstream / email account to ensure timely response
- **Deed of Novation;** produce Deeds of Novation and manage an accurate timely return from client and update all relevant systems / departments with relevant changes
- **Change of Certificate Details;** email Change of Certificate Details forms to the client, once received process of pass to 2nd Line team for further review (i.e. change of cert scope)
- **Contract Addendums;** produce relevant client contract(s) and manage an accurate timely return from client and update all relevant systems / departments with relevant changes
- **Customer contract requests;** provide copy contracts to customers on request
- **Invoice queries;** gather relevant customer information to enable credit control team to handle these queries at first contact
- **Handle customer enquiries IVR option;** ensure timely response times and aim to resolve queries on first contact
- **Live chat;** provide live chat support
- **2nd Line Customer Support Transfer;** ensure the timely transfer of relevant query types through use of Filemaker Ticket Types or live chat
- **Customer communication;** maximise the use of technology to ensure that customer contact is timely, professional and meets customer expectations e.g. live chat, email etc.
- **Customer enquiries;** progression of customer enquiries workstream to ensure timely response, achieving internal targets and KPIs.

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- **Client feedback;** proactively help gather customer feedback data and report trends to Customer Operations Manager regarding the service provided, in order to ensure our customer journey continues to improve.
- **Personal development;** ensure your own continuous professional development by keeping abreast of current retention and development techniques and trends

*Please note: While we endeavour to respond to all applications, if you have not heard back from us within 3 weeks of applying, your application has not been successful on this occasion. Applicant details will be kept on file for 12 months.*

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## Person specification

Customer Operations Retention & 1st Line Support Advisor	Requirement	How will this be assessed?(A = application I = interview)
<b>Qualifications</b>	A Level or equivalent	<b>A</b>
<b>Experience</b>	Customer service / Admin	<b>A</b>
<b>Skills &amp; Competencies</b>	<ul style="list-style-type: none"> <li>• Target driven</li> <li>• Good attention to detail and data literacy</li> <li>• CRM knowledge and previous usage (salesforce desirable)</li> <li>• Strong written, verbal and communication skills</li> <li>• Proactive, can do attitude</li> <li>• Strong organisational skills</li> <li>• Ability to learn complex products and processes</li> <li>• Ability to work cross functionally effectively</li> <li>• Strong word, outlook ,excel knowledge</li> </ul>	<b>AI</b>
<b>Behaviours &amp; Values</b>	Ready for anything	
<b><i>Can demonstrate examples thereof</i></b>	Make it happen	<b>I</b>
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