

## Role & Person Profile

General			
<b>Job Title</b>	Helpline and Insurance Advisor		
<b>Reports to (job role)</b>	Helpline and Insurance Manager		
<b>Business Unit</b>	Customer Services		
<b>Department</b>	Helpline and Insurance Team		
<b>Location</b>	Winchester		
<b>Date</b>	May 2017		
Dimensions			
<b>Budget</b>	<b>N/A</b>	<b>Headcount managed</b>	<b>0</b>
Role summary and purpose			
<p>To work as part of a team delivering first class customer service to patients using their Supplementary Insurance Benefit, ensuring all insurance and helpline queries are resolved with efficiency, diligence and within set timescales.</p>			
Key accountabilities and responsibilities			
<p><b>Be able to provide excellent customer service</b>            Deliver exceptional customer service in line with departmental standards, procedures and guidelines.</p> <p><b>Obtain additional sales through service</b>            To use exceptional product knowledge, active listening, questioning and summarising to secure sales of add-on products in line with departmental guidelines.</p> <p><b>Deal with customer queries</b>            Dealing effectively with Insurance and Helpline queries, providing a verbal or written response where appropriate to confirm the outcome/action. Responding to complex queries when required.</p> <p><b>Encourage team work</b>            To work as part of a large team (15+ full and part time advisors) to achieve departmental goals and uphold departmental standards including; taking responsibility for call response time by logging in for a minimum of 30 hours per week; ensuring all inbound calls are answered within three rings; all correspondence is responded to within three days of receipt.</p> <p><b>Maintain patient records</b>            To ensure patient records are maintained accurately and securely in line with departmental and regulatory guidelines</p>			

<p><b>Claims Administration</b> To ensure all claims meet the terms and conditions of the Supplementary Insurance Benefit, and are processed with a keen attention to detail.</p> <p><b>Efficient Helpline service</b> Arranging appointments for patients in need of emergency dental treatment, ensuring that the service is swift and professional.</p> <p><b>Answering customer queries</b> Ensuring all written and verbal insurance queries are responded to efficiently and fully, and to maintain call coaching grades to agreed benchmarks, ensuring the caller receives a pleasant and professional service as outlined in annual objectives</p> <p><b>Sales through service</b> To ensure sales and retention targets are met and exceeded whilst adhering to script and departmental guidelines.</p>	
<b>Internal interfaces and relationships</b>	<b>External interfaces and relationships</b>

<b>Personal Attributes</b>
<ul style="list-style-type: none"> <li>• Have a genuine interest in working with and helping customers</li> <li>• have good communication skills, both written and verbal</li> <li>• ability to work on own initiative and as part of a team</li> <li>• be polite, tactful and friendly</li> <li>• be numerate, lively and quick-thinking</li> <li>• be patient and calm</li> <li>• have an open minded attitude</li> <li>• be able to handle complaints and difficult situations</li> </ul> <p>quick and accurate keyboard skills and experience of using data bases</p>
<b>Essential Business/People/Leadership Skills</b>
<p>Have the ability to build relationships with both internal and external customers by the use of appropriate rapport building and language.</p>
<b>Experience</b>
<p>Customer service either in a retail environment or over the phone</p>
<b>Qualifications (essential and/or desirable)</b>
<p>GCSE or equivalent at grade C or above in English and Maths.</p>

**Technical Skills and Knowledge**

Microsoft Excel, Word, Power point and Outlook

**Work Arrangements**

You will be required to work 36.5 hours a week (Monday to Thursday 9am to 5.30pm and 9am to 4.30pm on Friday).

**Salary survey****Grade / Pay  
Zone****Job match****Updated by &  
date**