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| **Customer Services Executive**  **Engagement Division**  1 Year Fixed Term Contract | | | |
| **Based** | 1 Wimpole Street  London  W1G 0AE | **Travel** | N/A |
| **Reports** | N/A | **Reports to** | Membership Manager |
| **Seniority** | Team member | **Hours** | Full Time |
| **Key areas of influence** | Member Retention and Acquisition  Member and customer service and support  CRM/Data Management  Account Administration  Income Generation | | |
| **Key contacts** | **Internal:**  Membership Manager  Senior Customers Services Executive  Education Event Executives  Commercial Services Team  Library Team  Head of Membership and Marketing  **External:**  Current Members  Prospective-Member  Customers of the RSM | | |
| **Facts and Figures** | | | |
| To support and influence the retention and acquisition of members of the Royal Society of Medicine. Providing high levels of service and support via customer and member relations including:   1. Liaise with a broad range of members and non-members (in person/over the phone/email) to influence their membership decisions encouraging sales and retention 2. responding to emails received within three working days 3. promptly acknowledging/processing application forms 4. responding to requests/outcomes required from telephone enquiries within one working day 5. send membership card/welcome pack of application being approved 6. access and updating confidential member/Customer information   Ensure the provision of high-quality customer support for membership, and events (and other services as required) including the administration of accounts and personal information  Undertaking proactive and reactive sales of RSM services to meet required budget targets  Identify opportunities for sales and growth or trends within membership as a result of calls  Reporting customer feedback to Membership Manager or relevant Head of Department | | | |
| **Key Outcomes (Role Purpose)** | | | |
| Influence customer decisions to retain and attract members through the provision of high-level customer service and support  Identify opportunities for sales and growth or trends within membership as a result of conversations/connections  Responding promptly to email, telephone and face to face enquiries from members/ customers to maximise opportunities for joining, attending meetings, using library and cross sell appropriate services  Meeting with and providing tours of the RSM building for members/customers and prospective members to support and generate sales  Providing necessary support to Senior Customer Services Executive to include direct debit membership renewal processing | | | |
| **Key Objectives (Role Responsibilities)** | | | |
| Membership  To support and influence the retention and acquisition of members of the Royal Society of Medicine. Providing high levels of service and support via customer relations  Customer data and CRM Management:   1. updating records and preparing supporting paperwork (Access to confidential information) 2. Taking customer payments and sending receipts as required 3. Posting relevant membership application and renewal payments to customer records 4. Issuing Membership cards and new member packs as required   Events   1. Processing event bookings (telephone/email) 2. Processing event booking payment by invoice 3. Ensuring on the day registrations for events are processed and “no shows” updated onto the CRM system   General   1. Responding to face to face and telephone inquiries from customers to maximise opportunities for joining, attending meetings, using library and cross sell appropriate services 2. Contact customers who have made incorrect payments for membership/events and resolve any issues 3. Process refunds on CRM and initiate process for any refunds that Finance Team need to process | | | |
| **Person Spec- Key Competencies** | | | |
| Customer Services  Influencing sales and retention  Planning and organising  Analytical  Attention to detail | | | |
| Person SpecPersonal attributes, knowledge, experience & qualifications - Essential | | | |
| Proven track record in a customer service led role delivering high standards of service  Good communication skills – both oral and written  Proven experience of working with many departments and providing customer feedback  Flexible approach to work which will involve some evenings and weekends  Practical hands-on knowledge of using Word, Excel and CRM system  Proactive, resourceful and demonstrate initiative  Professional and helpful and diplomatic approach to answering customer inquiries and complaints  Ability to work in a busy customer facing role  Accurate keyboard skills and extensive knowledge and experience of CRM systems  Smart appearance | | | |
| Person SpecPersonal attributes, knowledge, experience & qualifications - Desirable | | | |
| Understanding of paperless direct debits and other forms of service payment  Experience of working in professional/membership organisation  Customer service qualification – or willing to undertake training in this area  Experience of managing membership, event related admin and/or related queries  Exceptional organisational skills and ability to meet deadlines | | | |
| **Organisational values & behaviours**  **The following generic statements are included in all RSM Job Profiles.** | | | |
| The post holder must always when conducting responsibilities and interacting with others:   1. Uphold the RSM values. Specifically treating others with RESPECT, INVESTING in people to help them develop and grow, striving to continuously IMPROVE what we do by setting ourselves and others stretching objectives and measuring outcomes, LISTENING to colleagues, customers and COLLABORATING to achieve more new ideas, DELIVERING our intentions. 2. Adhere to the Society’s Health and Safety regulations and ensure the safety of oneself and others engaged in the RSM premises and work by reporting hazards to a senior manager for address or taking actions (where possible) to remove safety hazards. 3. Adhere to the Society’s GDPR regulations and only use data as required to undertake their role and handle it in an appropriate and confidential manner. 4. Fully subscribe to the spirit of and adhere to the Society’s people policies the RSM’s Code of Conduct. | | | |