

JOB PROFILE

Post No.	30224
Post Title:	CRM Analyst & Customer Experience Lead
Unit/Team:	Customer Services
Grade:	E
Service:	Digital and Communications
Reports to:	Customer Services Manager
Issue Date:	14/02/2024

PURPOSE OF THE JOB

Review user journeys, user experience and lead on implementing improvements as they are identified. Champion the use of new processes and innovations to ensure our customers have an excellent experience throughout their journey with Rugby Borough Council. Using own skills, knowledge, and experience to develop and maintain systems, processes and supporting documentation. Ensure that colleagues have the data they need in the format and at the time they need it so that services are delivered to a consistently high standard. Support and train colleagues in the use of new processes and systems. Working as part of a team of Customer Service Advisors, responding to requests for information about a range of local and County Council services and helping customers to access and pay for services via the omnichannel customer channels.

1. ESSENTIAL FUNCTIONS AND RESPONSIBILITIES

- 1.1 To respond to requests for information and help customers access and pay for services using the channel they have chosen.
- 1.2 To recognise, respect and listen to the varied needs of customers and explore which solutions are available to meet their needs.
- 1.3 To recognise and deal with a whole range of customer emotions including people who are angry, abusive, aggressive, and potentially violent.
- 1.4 To consult with back office staff in order to provide customers with information that is accurate and sufficiently resolves the customer's enquiry.
- 1.5 To correctly identify and capture data relating to customer requests for services including logging, processing and progress chasing enquiries.
- 1.6 To develop and maintain up to date knowledge of the services delivered by the Customer Services Centre and the systems used to deliver those services.
- 1.7 To work to identified customer service standards and performance targets.
- 1.8 To note and report any areas where improvements are needed to minimise waste and increase levels of customer satisfaction.

- 1.9 To create and maintain detailed process flow charts relating to the services delivered, sometimes in collaboration with Business Analysts and Data Analysts
- 1.10 To create and maintain forms, workflows, processes, and integrations within the DXP (Digital eXperience Platform) to ensure that reports/requests for service and solved enquiries are available, appropriate, and efficient.
- 1.11 To provide training and support to colleagues relating to the DXP system, and related documentation.
- 1.12 To monitor and evaluate the effectiveness of the DXP system from an internal and external customer perspective.
- 1.13 To assist with the on-going development of data capture methods which facilitate management reporting on areas such as value and failure and customer satisfaction.
- 1.14 To drive forward service transformation across the Council relating to customer experience, providing excellent advice and guidance on process and service improvements.
- 1.15 To collaborate with the Customer Service Manager and other colleagues to identify Performance Indicators which provide relevant and accurate process information for performance improvement.
- 1.16 To upskill as the DXP develops, including gaining knowledge of Low Code processes and some element of full code

2. OTHER DUTIES AND RESPONSIBILITIES

- 2.1 To assist in maintaining up to date information on all relevant services and to conduct research as necessary.
- 2.2 To identify opportunities for self-development and undertake activities to improve both skills and knowledge.
- 2.3 To participate in all training and development activities necessary to fulfil the role.
- 2.4 To undertake general administrative and housekeeping duties in the Customer Service Centre.
- 2.5 Any other reasonable duties as requested by your manager, in line with your skills and knowledge.

3. SUPERVISORY RESPONSIBILITIES

There will be occasions when the CRM Analyst & Customer Experience Lead will be responsible for helping colleagues to improve the customer experience through design, process, or integration with other systems.

There will be occasions when the CRM Analyst & Customer Experience Lead will be responsible for guiding or leading a project squad.

There will be occasions when the CRM Analyst & Customer Experience Lead will be responsible for providing feedback and guidance to Management Team members for customer experience improvements.

In the absence of a Team Leader or coach, the CRM Analyst & Customer Experience Lead will undertake responsibility for the Customer Service Centre, incorporating Meet, Greet and Direct and Reception.

4. FINANCIAL RESPONSIBILITIES

Responsible for taking cheque, cash or credit or debit card payments, using chip and pin, either face to face or on the telephone.

Cash payments are not promoted or encouraged as Rugby Borough Council does not have a cashiering service. However, in the event of a customer having no other means of payment and if all other options have been exhausted cash can be accommodated.

There may be occasions where the CRM Analyst & Customer Experience Lead will provide advice and guidance to budget holders and project squads on spend.

5. RESPONSIBILITY FOR ASSETS AND DATA

Responsible for customer and business data in systems and databases.

6. EXTENT OF PUBLIC CONTACT

With members of the public, internal services of the Council and other agencies and outside bodies using different technologies e.g., phone, webchat, email.

7. WORKING CONDITIONS AND ENVIRONMENT

The post is primarily based within the Customer Service Centre, which is situated in the Town Hall, Rugby. There will be occasions where travel between departments, shared areas and other sites will be required to undertake duties.

The role will be desk based for much of the day

There will be occasions of a customer facing role which is a desk based position using call centre telephony and technology. There may also be some face-to-face contact with the public.

8. CORPORATE RESPONSIBILITIES

All staff must act within the Council's rules and follow all reasonable management requirements. These are contained within: the Council's Standing Orders, Employment Policies, Constitution and Code of Conduct for Employees. Other documents may be introduced at times setting out rules of the Council. These will cover responsibilities and requirements for the following:

Financial Accounting
Equality and Diversity
Health and Safety

Risk Management
Anti- Fraud
Data Quality and Data Protection
Business Continuity
Major Emergency Plan
Safeguarding
Procurement and Contract Management
Safeguarding of Children and Vulnerable Adults

Copies of the relevant rules and policy are available on the staff intranet or from your manager

In addition, all employees are expected to behave in line with our Values and Behaviours and challenge other employees whose behaviour is against our values.

9. KNOWLEDGE, SKILLS, EXPERIENCE AND QUALIFICATIONS

Refer to Person Specification attached.

Signed as agreed:

Postholder

Date

PERSON SPECIFICATION



Post: Customer Experience Lead

For effective performance of the duties of the post the postholder will be able to demonstrate that they have the skills and/or knowledge detailed in 'Essential Criteria.'

Criteria	Essential/ Desirable	Method of Assessment
3 GCSEs or equivalent, grade A – C or equivalent, including English	E	D
An initiative-taker who can work with minimal supervision, to see what needs to be done, and to work accordingly.	E	A,I
Experience of using technology and a range of systems to input data and manage relationships with customers.	E	A, I
Ability to work on own initiative.	E	A,I
Ability to share information, champion ideas and significantly contribute to service improvements.	E	A,I
Able to treat customers fairly, honestly, respectfully and in a polite and courteous manner.	E	A,I
Experience of team and project work	E	A,I
Able to consult with others and support colleagues to find solutions to customer enquiries.	E	A,I
Able to handle customer enquiries with sensitivity.	E	A,I,T
Able to move forward with service developments, adapt to change and demonstrate a flexible approach.	E	A,I,R
A commitment to work within our CAN DO values	E	A,I
Experience of dealing with customers both on the telephone and face to face.	D	A, I, T
Excellent and up to date working knowledge of CRM systems.	D	A,I
Knowledge of council services.	D	A,I
Experience of reviewing a customer journey, identifying improvements, and guiding solutions.	D	A,I, T
Excellent telephone manner and interpersonal skills with the ability to deal with people at all levels both spoken and written.	D	A,I, T
Ability to logically map processes and systems.	D	A,I
Able to prioritise and deliver a busy workload to meet deadlines	D	A,I

Application	A
Interview	I
Test (written, presentation, practical – e.g., word processing)	T
References	R
Documentary – e.g., certificates	D