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| <b>Name:</b>   |                               |
| <b>Title:</b> Customer Experience Advisor            | <b>Department:</b> Commercial |
| <b>Reporting to:</b> Customer Experience Team Leader |                               |

As part of the Customer Service Department the Customer Experience Advisor (CEA) plays a key role in all touch points during the customer experience. The CEA is involved in brand awareness, **attracting** and retaining business by working with various departments to co-ordinate online and external events. The CEA sets up customer email campaigns, ensuring accuracy and in line with company brand guidelines. The CEA owns the onboarding process from start to approval, ensuring any obstacles internally or externally are resolved. The CEA **enhances** the customer experience by being solutions-focussed, and is responsible for ensuring, whilst working as a team that all customer queries are answered efficiently and effectively, with minimal waiting times, whilst always aiming for first contact resolution. Where first contact resolution is not possible, queries will be transferred to the relevant department to action, in these instances the CEA will ensure the correct expectations are realistically set, customers are kept up to date on progress, and their needs have been met. The CEA continuously strives to **engage** with internal and external customers, promoting a collaborative approach. The CEA actively **listens** during all interactions, to identify customers needs and trends, whilst actively seeking feedback through various channels. All interactions are recorded within Customer Relationship Management (CRM), to ensure effective communication, analysis and reporting.

**Job Responsibilities:**

**Customer Support and Relationship Management:**

- 1. Comprehensive Customer Support:** Serve as the primary point of contact for all incoming customer inquiries across multiple platforms, including email, web chat, phone, and web forms, demonstrating professionalism, empathy, and a proactive, solution-oriented mindset.
- 2. Escalation Management:** Take full ownership of escalated inquiries, ensuring resolution at the first point of contact whenever possible. Effectively communicate and collaborate with internal teams to resolve complex issues, providing customers with transparent timelines and regular follow-ups. Manage expectations, mitigate risks, and provide regular reports to department managers regarding ongoing queries.
- 3. Service Level Agreement (SLA) Adherence:** Lead efforts to consistently meet or exceed established SLAs for phone, chat, email, form submissions, cases, and onboarding processes. Proactively identify and address delays to ensure optimal service delivery.
- 4. High-Quality Support Delivery:** Ensure a high standard of customer service by responding promptly to queries, delivering tailored resolutions, and ensuring customer satisfaction in all interactions.
- 5. Customer Satisfaction Monitoring:** Proactively monitor and analyse customer satisfaction through surveys and feedback, addressing potential issues and escalating complaints promptly to management for resolution.
- 6. System Support and guidance:** Provide advanced support for systems such as Parnassus, Surpass, Moodle, SharePoint, and others. Provide Ad hoc guidance and assistance to customers over phone or email, ensuring a seamless experience and facilitating system adoption. Ensure that any product updates or changes are communicated to relevant external stakeholders.
- 7. Account Management:** Oversee customer account management, ensuring timely updates to account contacts and relevant information within internal systems.
- 8. CRM and Data Management:** Accurately log and track all customer interactions within the CRM system, ensuring that data is current, complete, and accessible for internal teams.
- 9. Expectation Management:** Effectively manage and exceed customer expectations by delivering on promises made during interactions, ensuring complete follow-through.
- 10. Email Campaigns & Marketing Support:** Take a pivotal role in creating and executing email campaigns within the agreed timelines, working closely with the Marketing team ensuring that marketing lists are appropriately managed and segmented within the CRM system.
- 11. Process and Service Improvement:** Contribute to the continuous improvement of customer service by documenting processes, reviewing service strategies, and suggesting enhancements based on direct customer feedback and internal observations.
- 12. Cross-Departmental Collaboration:** Collaborate closely with other departments to create and maintain comprehensive help guides, tutorials, and videos that empower customers to utilise services effectively.
- 13. Online Training & Support:** Lead online training sessions for customers, helping them navigate and maximize the value of systems and tools, thereby contributing to customer success.

14. **Administrative Support:** Provide administrative coverage across other areas within the organization as needed, ensuring operational continuity.
15. **Centre Training Management:** Coordinate with Educational Quality Assessors (EQA) to organize and manage Centre training, ensuring all necessary resources and documentation are in place, and maintain accurate internal records for all completed and scheduled training.
16. **Withdrawal Process Oversight:** Oversee and manage the withdrawal process for Centres, ensuring a smooth transition and that all necessary steps are followed.
17. **Relationship Building:** Establish and nurture strong, long-term relationships with customers, fostering trust and loyalty through consistent, high-quality support and service.
18. **Industry Knowledge & Trends:** Stay current with industry trends and best practices, leveraging this knowledge to provide relevant, up-to-date guidance to customers and internal teams.
19. **Feedback Management:** Gather, analyse, and distribute customer feedback across departments to ensure the organisation continually evolves based on customer insights.
20. **Onboarding Support:** Lead the customer onboarding process, liaising with both internal and external stakeholders to ensure that new Centres have access to the necessary resources and tools for success.
21. **Process Enhancement & Workflow Optimization:** Identify inefficiencies or areas for improvement within existing workflows, making recommendations to enhance the customer experience and operational efficiency.
22. **Comprehensive Documentation:** Create and distribute clear, concise guidance materials, including FAQs, tutorials, and procedural documents, to help customers understand and maximize Ascentis systems.
23. **Cross-Functional Workflow Streamlining:** Work collaboratively across departments to streamline workflows and improve the overall customer experience by identifying and addressing potential bottlenecks or challenges.
24. **Adaptability & Change Management:** Demonstrate flexibility in adapting to the evolving needs of the organisation and customers, ensuring smooth transitions during periods of change or process improvement.

### Events Coordination:

25. **Event Administration:** Oversee the administrative functions required to ensure the seamless execution of all Ascentis events. Coordinate with internal teams to support event planning, organization, and logistics.
26. **Material Preparation & Logistics:** Ensure timely preparation and delivery of materials and resources to and from event venues, facilitating successful event execution.
27. **Webinar Management:** Take the lead in organizing and executing webinars across multiple departments, ensuring smooth participant approvals, delivery of pre-webinar materials, and efficient processing of post-event documents, including certificates of attendance.
28. **Event Management:** Manage all aspects of Ascentis events, ensuring the execution of a seamless and successful event experience, collaborating with stakeholders to meet organizational objectives.

### Key Skills & Qualifications:

1. Strong problem-solving and conflict resolution skills, with a proactive and empathetic approach to customer service.
2. Exceptional communication skills, both written and verbal, to manage customer expectations and facilitate cross-departmental collaboration.
3. High level of organizational ability and attention to detail, ensuring SLAs are met and processes are adhered to.
4. Experience in CRM software, marketing tools, and customer support platforms.
5. Ability to manage multiple priorities, with a focus on quality, customer satisfaction, and operational efficiency.
6. Ability to manage complex projects, such as Centre training and event coordination, from start to finish. Strong adaptability and flexibility, with the ability to pivot and respond to changing business and customer needs.

### General

17. Monitor stock levels of all company branded stock inclusive of event stock and internal materials such as business cards and letterheaded paper, maintaining minimum stock levels;
18. Ordering and managing stock levels for multiple internal teams
19. Order necessary stock with approval of Marketing Communications Manager;
20. Front-line support for external visitors gaining access to Ascentis House and notifying relevant member of staff;
21. Securely handle the incoming post, distributing to the relevant departments where necessary
22. Ensure all outgoing post is collected on a day to day basis

### Corporate Responsibilities

The following responsibilities apply to all roles:

1. Contribute as required to regulatory compliance and engage with other processes including business continuity, risk management and the internal audit process;
2. Contribute to the improvement of customer service;
3. Undertake any other responsibilities or tasks that are within the employee's skills and abilities whenever reasonably instructed commensurate to this role.

### General Responsibilities for all Staff

As a member of staff at Ascentis you will be expected to:

4. Understand and be committed to the Ascentis Vision;
5. Work hard and flexibly to achieve your targets and those of the Company and be positive at all times;
6. Actively support a problem-solving culture within your team by seeking to remove any barriers that stand in the way of achieving our targets;
7. Work flexibly to meet the needs of our customers;
8. Implement strategies to achieve continuous improvement in your own performance.

### Status of this Job Description

The above job description is a guide to the work you may be required to undertake but does not form part of your contract of employment and may change from time to time to reflect changing circumstances.

### **Success Measures**

1. By targets set in the Customer Service Strategy and job description
2. Through customer surveys, including First Contact Resolution (FCR), Customer Satisfaction (CSAT), and Net Promotor Score (NPS)
3. Through the Performance Management process

The above job description is a guide to the work you may be required to undertake but does not form part of your contract of employment and may change from time to time to reflect changing circumstances.

### **Accountability and Key Contacts:**

#### Accountability

Marketing Communications Manager, Deputy Commercial Director, Commercial Director, Chief Executive Officer

#### Key Contacts

- Staff at all levels within Ascentis
- Examinations Officers and Centre Coordinators
- Centre contacts
- Moderator/Verifiers

**Key Attributes (E-Essential, D-Desirable, P-Potential):**

1. Commitment to a high standard of customer service (E)
2. Professional and confident use of the telephone system (E)
3. Positive attitude to change, development and quality (E)
4. Understanding and experience of providing effective customer service (E)
5. Excellent verbal and written communication skills (E)
6. Proven ability to work effectively independently and as a member of a team (E)
7. Strong Communication Skills (E)
8. Customer-Centric Attitude (E)
9. Problem-Solving Ability (E)
10. Multitasking and Time Management (E)
11. Attention to Detail (E)
12. Technical Proficiency (E)
13. Team Collaboration (E)
14. Competent in the application and operation of ICT (E)
15. Ability to organise and prioritise own workload (E)
16. Be empathetic and understanding to customer issues (E)
17. Competent and experienced in the application and operation of ICT, for database operations and word processing including basic desk top publishing (E)
18. Ability to achieve agreed targets and to work to deadlines (E)
19. Experience with Data or Metrics (D)
20. Adaptability (D)
21. Knowledge of the Industry/Brand (D)
22. Cultural Awareness (D)
23. Brand Advocacy (D)

**Agreed:**

Post Holder \_\_\_\_\_ Date \_\_\_\_\_

