

**Job title: Customer Relations Manager
(Full time – permanent)**



Department: Customer Relations

Reporting to: Finance Director and Company Secretary

ROLE DESCRIPTION

This is a key role within Sovereign Health Care, leading the integrated Customer Relations team, which is the main point of contact for prospective, new and existing customers and is also responsible for the processing of their claims.

As well as ensuring our customers receive a best in class experience when interacting with us, the role is crucial in developing our processes and people capability, through collaboration, coaching, training and setting an example as a role model.

ATTRIBUTES

The Customer Relations Manager is an important leadership role within Sovereign Health Care as the department is often the front line for most of our customer interactions.

You will put the customer at the heart of what you do and will be accomplished at adapting your approach to identify and meet their needs. You will be comfortable communicating with people at all levels.

A proven manager of people you will be able to lead, manage, coach and mentor your team to further their development and deliver your departmental objectives and service standards. You will be dynamic and flexible in your thinking and will lead your department in continuously improving processes and procedures. You will foster an atmosphere of working collaboratively; promoting learning, understanding and a positive approach to change.

A highly motivated individual with a drive to succeed, you will be an excellent communicator with exemplary organisation and people management skills. In a dynamic and fast paced environment, sound and consistent judgement is required that delivers both qualitative and quantitative outcomes. You will be a positive role model and will be a key driver in ensuring the success of your department.

DESIRED COMPETENCIES AND CAPABILITIES

- Customer service excellence – has the ability to see situations from the customer viewpoint
- Planning and organising – sees the big picture and utilises resource for maximum effectiveness
- Judgement and decision making – makes decisions based upon commonsense principles and fairness
- People focused – understands everyone is different and tailors their approach, including management style
- Coaching – natural and committed ability to improve outcomes and behaviours
- A skilled communicator – a clear, confident and empathetic communicator, whether that be written or verbal
- Self-management – a natural self-starter who thrives within the freedom of the role
- Accountability – committed to taking responsibility and ownership for agreed actions; be able to hold others accountable
- Demonstrated awareness and understanding of data protection legislation
- Competent in Microsoft Office applications and experience of using customer databases

ESSENTIAL COMPETENCIES AND CAPABILITIES

- Experienced supervisor with strong people management skills
- Excellent customer service skills
- Ability to achieve team outcomes through a consultative and supportive approach
- Issue resolution and problem solving – able to seek relevant information to gain understanding and present an appropriate solution. Able to anticipate obstacles and take steps to avoid/mitigate accordingly.
- Focus on accuracy and attention to detail
- Experience of working in a PRA/FCA regulated environment

KEY RESPONSIBILITIES

- Day-to-day management of the Customer Relations department, supported by Customer Relations Team Leaders, working to agreed service levels to deliver departmental objectives. This includes the planning, delegation and communication to team members and the continual drive to improve service levels.
- Problem solving as required to ensure solutions are thought through, appropriate and consistent with company values.
- To build and develop a first class team, that aims to continually improve customer outcomes and supports each other to deliver this aim.

Customers

- Ensure all new customers, either corporate or individual, are set up within agreed timescales and policy documentation is sent out
- Issue new corporate clients with relevant documents
- Ensure all claims are paid accurately and within published timescales
- Development of the payment and checking process to ensure the correct balance between processing costs, error rates and the risk of fraud
- Manage complaints received to agreed procedures and timescales including the production of complaint response
- All customer queries/interactions are handled appropriately with escalation to senior person as required
- Review, document and develop your team's processes and working practices to improve service standards and deliver efficiencies and cost savings
- Ensure all customer information held within company systems is accurate through the development of an ongoing audit process, including with corporate customers where applicable

Staff/Colleagues

- Agree objectives for all team members which support both department and overall business goals
- Monitor the performance of the Customer Relations team, through observations, call listening and evaluation and other metrics
- Develop team leader and team infrastructure to ensure daily continuity in service delivery, proactively managing resource to accommodate absence and business demands
- Ensure 1 to 1's are conducted on a monthly basis within your department. 1 to 1's are designed to be a two way process for staff and managers to communicate and collaborate to enable the individual to achieve their best possible performance
- Provide coaching and training to team members to enable them to achieve their objectives and job function, while at the same time demonstrating empathy and

support in their behaviour

- Ensure your department has a thorough knowledge of the product range, individual product benefits and company processes in order to meet customers' needs
- Conduct regular team meetings to promote positive team spirit, understanding, and open communication within your department
- Keep accurate and thorough records when managing your team, including any staff issues, to ensure staff are treated fairly, objectives are delivered, and training/coaching commitments are implemented to support their development
- Manage holiday requests to ensure adequate department cover. Ensure all absence is handled appropriately in line with the Staff Handbook
- Ensure departmental and company processes, policies and procedures are adhered to and update as required
- To ensure your department activities are delivered to a high standard with attention to detail, a high degree of accuracy and are compliant with FCA, PRA and data protection regulations. Ensure your department are aware of the of the possible consequences for the company if data breaches occur

Management Information and Reporting

- Review and develop M.I. reports on an ongoing basis making changes when required
- The maintenance and security of all relevant correspondence, reports, books and records in both soft and hard copy form in accordance with statutory regulations and business requirements for the whole department
- Ensure that all company remittance/reconciliation lists plus leavers/joiners are processed correctly in a timely manner
- Action members/firms reports daily
- Action Informer scheduled reports weekly/monthly as required
- Manage the issue of retention letters within agreed timescales
- Develop reports that allow accurate and evidenced feedback to be given to team members that feeds into the 1 to 1 and appraisal process

Customer payments

- Check and sign off manual payments within delegated authority levels
- Liaising with the company credit control/payment allocation function, ensure company payments are posted accurately and timely

General

- Have a personal responsibility and attitude towards health and safety and ensure you do everything to maintain and promote a safe working area
- Manage your own personal development, in line with objectives agreed as part of the development and appraisal process
- Take personal responsibility for following established departmental and company procedures, and where identified, communicating to your line manager any ideas for improvements or change
- To be an ambassador for Sovereign Health Care being mindful that you are always representing the leadership team when dealing with both customers and team members
- To carry any other duties as delegated by line manager
- You will also be required to carry out any other duties that may reasonably be required of you.
- On occasion, be willing to be flexible regarding start and finish times to meet foreseen or unforeseen work

Normal hours 08:45 to 17:00 Monday to Thursday and 08:45 to 16:00 Friday. Lunch 45 minutes Monday to Thursday and 60 minutes on Friday.

Due to the nature of the role, flexibility around core working hours is expected.