# Image of Guide Dogs logo - the words Guide Dogs and a full stop.

# **Success Profile**

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| **Role** | Client Liaison Officer |
| **Reports to** | Client Liaison Team Lead |
| **Location** | St Leonards, NSW |
| **Manages / Supervises** | N/A |
| **Date revised** | June 2022 |

## Purpose of the Job:

Guide Dogs NSW/ACT is one of Australia’s most trusted charities with a long history of providing services to clients who have vision impairment that promote their independence. In line with our ‘Purpose’, Guide Dogs are seeking a Client Liaison Officer to assist clients to access services by supporting them through the intake procedure.

This provides support to the Client Services team by streamlining the on boarding procedure using consistent language surrounding funding, service agreement completion and ensuring all required data is placed within the CRM system as per compliance and regulatory needs. This process will also ensure responsive and efficient allocation of services.

The successful candidate has a sound knowledge and experience of client management systems and government funding streams available to clients with vision impairment or loss. The candidate will demonstrate superior customer service skills with the ability to manage workloads, engage with clients and develop positive relationships, manage change effectively, continuously improve customer experiences and work efficiently within a team. This role will also provide backup support for our St Leonards reception team.

## Key Accountabilities:

| Key Result Area | Job holder is successful when: |
| --- | --- |
| Central Intake | * Clients (via telephone, email and face-to-face) who are enquiring about receiving a service from Guide Dogs are provided with timely, accurate and helpful information. * All data is captured, funding streams discussed, and an estimate of support and service request is created. * Service delivery teams have access to completed intake details that allow for the timely commencement of service(s). * Funding portals are understood and accessed when required. * Information is shared with clients regarding available funding and eligibility. |
| CRM Administration | * All client information is entered into the Client Relationship Management system (CRM/Integrate) and client’s information is captured whilst maintaining timely and accurate electronic records. * All required documentation is uploaded to the CRM and audits are completed quarterly * Appropriate documentation is maintained as required to meet statutory requirements including statistical data for reporting purposes |
| Service Agreements | * All clients receiving a service from Guide Dogs have a service agreement in place using templates and collaboration occurs with specialist for completion. * Current agreements with clients are reviewed and contact is made with those who are expiring in the upcoming two months to understand if they are looking to continue service and require a quote. * Relevant Manager is engaged to complete pause/exit process for clients. |
| Customer Experience | * Communication occurs with clients in conjunction with NDIS administration support to solve any funding issues when required. * Utilisation of the VOC survey and consultations indicate the central intake experience is positive demonstrating an excellent customer experience journey. * The net promoter score and customer satisfaction scores meet KPI targets. |
| Cross-Departmental | * Written communication is edited and formatted to ensure professionalism and high standard (e.g. final reports to referrers, access audit reports). * Responses to requests from clients or Instructors occur within a timely manner or in line with the agreed timeframes. * When required and under the direction of the Manager, referring organisations and professionals in the region are liaised with to promote our services. |
| Reporting | * Assistance is provided for Managers to produce reports and monitor key performance data for the region. * Data reports are analysed monthly. * Continuous improvement for the central intake model occurs by providing feedback and suggestions and assisting with implementation. |
| Utilisation of funding | * Reports demonstrate a steady increase of clients using their government funding to access services and there is a reduction in non-billable hours. * A reduction in inconsistencies regarding claiming government funding occurs. * An awareness of risk management is evident to ensure funding KPI’s are met annually. |
| Reception | * Flexible and adaptable approach taken to providing cover for reception, as and when required. * All visitors are staff feel welcome and comfortable in the St Leonards space. * Interactions with all internal and external stakeholders via phone, email and face to face are warm, efficient, professional and friendly including staff, clients, students, referrers, suppliers, volunteers etc. |
| WH&S Responsibilities | * Follow Guide Dogs NSW/ACT WH&S policy, procedures and rules, and follow safe work practices. * Participate in team meetings to discuss workplace health safety in the department. * Report any hazards and incidents as soon as possible, whether or not someone was injured. * Participate in WH&S activities such as training, inspections, investigations, evacuation drills, WH&S meetings and risk assessments as required. * Ensure that anything which is provided in the interests of workplace health and safety is not misused or interfered with. |
| Values | * Demonstrate and promote the GDN values:   + Lead with Head and Heart   + Never stop exploring   + Walk the talk   + Lift each other |

## Knowledge and Experience Required to be Successful in the Role:

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| Essential | Desirable |
| * Completion of an administration qualification and/or experience in a similar role. * Superior customer service skills and ability to liaise professionally, sensitively, and appropriately with clients who have vision impairments. * A team player, with friendly and flexible approach. * Excellent interpersonal, verbal and written communication skills with the ability to relate to a range of stakeholders including clients, staff and other organisations via phone, email and in person. * Strong computer skills especially in Microsoft Word, Excel, Outlook and PowerPoint. * Demonstrated drive and ability to organise, prioritise and complete the duties assigned. * Able to manage the physical demands and inherent requirements of the job and complete the tasks and duties as stated. * Maintain a “Working with Children Check” or “Working with Vulnerable People” clearance | * Understanding of the National Disability Insurance Scheme and My Aged Care funding streams including the use of the portals. * Understanding of regulatory audit processes and requirements to demonstrate standards. |

## Notes:

* Complete other tasks as required / directed.
* Participate in personal development opportunities.
* Keep informed on company procedures and policies.

Name:

Signature:

Date: