

# POSITION DESCRIPTION

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<b>Position title:</b>	Customer Service Advisor
<b>Location:</b>	Geelong Branch Network
<b>Reports to:</b>	Branch Manager
<b>Entities:</b>	GMHBA Ltd
<b>Organisational level:</b>	Grade 4
<b>Reports:</b>	No Direct Reports

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## Job Purpose:

To provide an exceptional customer experience to all GMHBA Limited members and to assist in promoting membership growth by providing information on GMHBA Limited products and services.

## Accountabilities:

The principle accountabilities are:

- Welcome customers to the GMHBA Retail store and provide prompt friendly service
- Ensure customer experience is of the highest standard throughout all interactions
- Provide professional advice to existing and potential members on GMHBA products and services to enable the growth of the business
- Process member activities as required (e.g. claims, payments, membership changes etc.)
- Ensure that accurate cash handling and balancing procedures are adhered to as per company policy.
- Ensure job knowledge is kept current with both GMHBA P&Ps and the Health Insurance Industry (i.e. via memorandums, staff updates, online policies and training etc.)
- Participate in outbound activities as required, including the membership retention program, and prospective new member courtesy calls
- Participate in all team activities such as team meetings and individual coaching sessions.
- Promote GMHBA Health Services including but not limited to Eyecare and Dental
- Promote GMHBA Health & Wellbeing programs
- Meet individual KPIs and contribute to the achievement of team goals and objectives

Review date: October 2019  
Approved by P&C Manager



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- Be actively involved in GMHBA's community engagement programs/activities
- Perform any other duties as requested by a relevant line manager

### **Planning and Implementation**

- Contribute to delivery of all aspects of the GMHBA's overall strategic plan and objectives through planning own work and timely attendance to all delegated tasks and functions
- Consider problems or issues that may arise and use lateral thinking to resolve or recommend solutions
- Bring to the attention of your team leader/manager risks and issues that may need to be escalated from time to time
- Actively participate in all business activities such as team meetings, training and development opportunities, information sessions and committee meetings
- Collaborate and seek input from team members, specialist functions and others as required, to maximise performance outcomes

### **Regulatory & Reporting**

- Record all member correspondence in the appropriate Customer Service System
- Ensure compliance with the Company's Delegated Authorities, Business Plan, Policies and Standards
- Support company audit processes and make recommendations as required
- Keep up to date with regulatory trends and changes and actively participate in training and update activities
- Prepare information and reports for management as required.

### **Stakeholders & Advice**

- Provide advice, share knowledge and identified solutions/wins with others to facilitate strong team performance
- Maintain positive and constructive relationships with internal and external stakeholders.

### **Other**

- Uphold the company values, culture and performance standards
- Participate in the roll-out of business change programs designed to strengthen GMHBA's performance

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- Embrace the mindset and actively contribute towards embedding the GMHBA Way including working in an Agile environment.
- Perform 1st Line of Defence duties by identifying operational risks, assist in investigating their root causes and provide support to mitigate risk through understanding control effectiveness and recommending risk improvement
- It is not the intention of this position description to limit the scope or accountabilities of the position but to highlight the most important aspects of the position.
- The accountabilities described within may be altered in accordance with the changing requirements of the role.

### Key Relationships:

#### Internal:

- PHI Operations – Retail & ARC Team
- PHI Operations – Service Team
- Membership Team
- Capability Team
- Continuous Improvement Team
- Benefits Management Team

### Skills, Experience and Qualifications:

#### Mandatory

- Demonstrated experience in a busy customer service and team-based environment
- Strong focus on delivering excellent service and quality outcomes for customers
- Well-developed communication skills (written and spoken)
- The ability to build positive relationships with both internal and external stakeholders
- Proactive, self-motivated and works on own initiative
- Basic computer literacy including competent use of Microsoft Office and customer databases
- A proven ability to prioritise your workload with a strong attention to detail
- Committed to continuous improvement

#### Highly desirable

- Experience in a busy retail environment
- Experience in PHI or a similarly regulated industry (e.g. banking or general insurance)
- Experience in sales and working to sales targets
- Demonstrated understanding of the sales process with previous cross selling experience

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