**POSITION DESCRIPTION**

**Position title:** **Customer Service Advisor**

**Location:** **Geelong Branch Network, Regional Branches**

**Reports to:** Branch Manager

**Entities:**  GMHBA Ltd

**Organisational level:** Enterprise Agreement Grade 4

**Reports:**  Nil

**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:**

**Professional Conduct**

* Participate in all team activities such as monthly team meetings, and individual coaching sessions.
* Assist where required other areas of the business i.e. Head Office, Geelong Branch network.
* Timely attendance to all duties and delegated tasks

**Sales and Customer Service**

* Welcome customers to the GMHBA Retail store and provide prompt friendly service
* Ensure customer experience is of the highest standard throughout all interactions to deliver strong service and sales.
* Provide professional advice to existing and potential members on GMHBA products and services to enable the growth and performance of the business
* Process member activities as required (e.g. cover reviews, claims, payments, membership changes etc.)
* Ensure that processes are performed accurately including 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
* Be actively involved in GMHBA’s community engagement programs/activities
* Perform any other duties as requested by a relevant line manager

**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
* 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.
* 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

**Key Relationships:**

|  |  |
| --- | --- |
| **Internal:*** PHI Operations – Retail & ARC Team
* PHI Operations – Service Team
* Membership Team
* Capability Team
* Continuous Improvement Team
* Benefits Management Team
 | **External:*** Members
* Providers
 |

**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