**POSITION DESCRIPTION**

**Position title:** Customer Service Advisor

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

**Reports to:** Branch Manager

**Entities:**  GMHBA Ltd

**Organisational level:** Grade 4

**Reports:**  No Direct Reports

**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
* 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
* 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:**

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