# My role with Anglicare

## POSITION DESCRIPTION

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| **Position Title:** | Advisor, Client Services |
| **Service/Facility/Department:** | Client Service Centre |
| **Direct Reports:** | Nil |
| **Key Relationships:** | **Internal:** Anglicare managers and team members, CSC team |
| | **External:** Prospective clients, their families and/or carers |

### Position Statement / Overall Purpose

The overall purpose of the Advisor, Client Services is to provide the first point of contact for prospective clients of Anglicare who have been assessed as eligible for packaged care, and to facilitate the process of a prospective client's entry to service.

The key focus of this role is to establish a connection with the client through a personalised and positive customer experience that reflects the Anglicare brand, ensuring the client's needs are understood and responded to appropriately, and placing Anglicare as preferred choice for service delivery.

The Advisor, Client Services will work in accordance with the values of Anglicare Southern Queensland (Anglicare) and support core business by providing service, guidance and advice within this position's specialty area.

### Position Specific Credentials, Qualifications and Other Requirements

- Current National Police Check
- Ability to work rotational roster shifts between the hours of 7am – 7pm Monday to Friday
- Certificate III in Call Centre Communications (desirable)

### Key Selection Criteria

1. Previous experience in a frontline or call centre sales and customer service environment
2. Able to provide an exceptional service experience and convert sales opportunities
3. Capacity to learn, understand and retain information on a broad range of services
4. Ability to engage prospective clients in conversations that build an understanding of their needs whilst promoting Anglicare as a service provider
5. Communicate effectively and empathetically with older people, their families and representatives
6. Able to work independently and with minimal direct supervision
7. Advanced skills Microsoft Word and Excel and an ability to learn new software programs
8. 40-60wpm range and 95% accuracy alpha/numeric skills

**Key Accountabilities and Responsibilities**

1. **Accountability: Sales and Customer Service**
*Utilise best practice sales and customer service skills to ensure exceptional experience for all prospective and existing clients and others who initiate contact with Anglicare.*

   **Responsibilities:**

   - Deliver exceptional and professional service by responding to and assisting in a timely manner
   - Maintain an understanding of regional implications of client referrals to manage expectations
   - Develop and maintain literacy in health terminology and funding requirements
   - Act as a brand ambassador by modelling the Anglicare values in every interaction with clients, colleagues and general public
   - Contribute to a positive customer service experience by being energetic, enthusiastic and engaged in every interaction with a client

2. **Accountability: Manage My Aged Care Gateway (MACG)**
*Extract client information from My Aged Care Gateway portal and initiate positive contact with client.*

   **Responsibilities:**

   - Maintain knowledge and monitor availability of packages in services
   - Monitor My Aged Care Gateway (MACG) for prospective clients, screen referrals for suitability and contact those deemed appropriate
   - Provide the prospective client with information to assist them in choosing Anglicare as their preferred service provider
   - Prepare and distribute information packs relating to the potential admission to service
   - Accurately record referral information in the Client Information System (Procura)
   - Adhere to client's privacy and confidentiality as per Anglicare policies and procedures
   - Adhere to all requirements relating to the MACG
   - Schedule Client Liaison visits

3. **Accountability: Client Information System**
*Use appropriate technology effectively and ensure work is performed to a high standard.*

   **Responsibilities:**

   - Attend training to assist with skills development and to keep current with software upgrades.
   - Assist with training of new staff.
   - Ensure all information in client information system is accurate, effective and current

4. **Accountability: Team Contribution and Continual Improvement**
*Participate in training and continual quality improvement activities, and contribute to a positive team environment by working together to achieve organisational outcomes.*

   **Responsibilities:**

   - Support colleagues, consider others views, and take part in working to achieve common goals and team cohesion

- Contribute to ideas for improved ways of working and assist with the implementation of routine changes
- Participate actively in staff meetings and share information to improve work environment and outcomes
- Undertake professional development and regular training opportunities to ensure skills are developed and maintained to meet the inherent requirements of the role

**Other Duties and Requirements**

- Maintain confidentiality, including but not limited to information relating to residents, clients and employees of Anglicare and do not disclose information during or after employment
- Act in accordance with Anglicare's Code of Conduct and the organisation's policies and procedures
- Ensure that credentials and qualifications set out in this Position Description are current at all times
- Undertake those tasks outlined on a duties list, or any other tasks delegated to you by your manager or supervisor, provided these requirements are safe, efficient, relevant, legal and within your abilities
- Undertake work practices in a safe manner and comply with work health and safety instructions, within relevant policies and procedures
- Undergo relevant evaluations and assessments, as requested by Anglicare, to ensure that the physical and functional requirements of the role can be met

**Delegation of Authority:**

- In accordance with the Anglicare Delegations of Authority Policy.