

Post Specification

Post Specification - Key Information

- **Post Title: Senior Customer Service Advisor – Transactional**
- **Date: September 2025**
- **Post Group Number: 8799**
- **Job Family: Customer Engagement**
- **Job Family Role Profile: CE8ii**
- **Final Grade: 8**

To be read in conjunction with the job family role profile.

Service Area Description

The Customer Service Team are a key delivery mechanism to deal with all in person transactions, digital transactions and telephone enquiries, resolving as much as possible at the first point of contact by a single customer service team approach.

Wherever possible we encourage the self-serve model and facilitate digital service delivery, reducing demand for phone and in-person interaction so resources can be focused to those most in need, ensuring customers are satisfied with their experience and that service delivery is citizen centred and seamless between services and partner organisations, promoting a “Tell us once” approach.

As a Senior Customer Service Advisor, you will better understand and help customers to overcome barriers to accessing services that some people experience, promoting inclusivity by working to remove barriers such as poverty, trauma, physical accessibility, neurodiversity, rurality and low income.

Purpose of this Post

Assist customers via multiple channels, maintaining place-based knowledge and community asset information that will be proactively shared with customer service colleagues to enable enquires to take account of local community assets and resolve enquiries effectively at point of contact wherever possible.

Support customers to undertake the main types of transactions with the council, including register, apply, book, pay, check and tell. This post will act as point of contact for escalation of locality-based issues. This will include engagement with a range of stakeholders internal and external to the organisation to maintain high standards of customer service, through a customer centric approach.

Key Job Specific Accountabilities

1. To improve outcomes for the residents of Westmorland and Furness by providing accurate advice and guidance for internal and external stakeholders through advice and information and identifying the most appropriate pathway to community-based services. Providing an effective escalation route for complex service enquiries,
2. You will provide localised expert knowledge to better understand and help customers based in their locality, to overcome barriers to accessing services that some people experience,

promoting inclusivity by working to remove barriers such as poverty, trauma, physical accessibility, neurodiversity, rurality and low income, while signposting to available support within the locality.

3. Demonstrate a person-centred approach to communication, having the ability to cater services towards those with protected characteristics and, where it is determined someone may be eligible for care and support, the team will ensure that those at risk of harm are supported through our safeguarding arrangements
4. Members of the team will work collaboratively with internal stakeholders across the organisation to determine the best outcome for the customer, promoting the customer strategy and customer charter at every turn.
5. To act as an interface for customers and partners enquiring via telephone, in writing or face-to-face, that may not be eligible for statutory services but require advice and guidance, immediate support and to work with residents to foster long-term solutions that promote self-sufficiency.
6. Ensure that information is recorded accurately and appropriately within applicable systems, ensuring compliance with the relevant legislation, policies and procedures and in accordance with timescales.
7. Facilitate the correct resourcing by working collaboratively with customer service advisors and Senior Customer Advisor colleagues, rotas will be collated to maintain sufficient levels across all channels for customers.
8. Evoking a sense of community-centred care and collaboration with an emphasis on creating a stronger, more resilient community through providing clear guided pathways to advice and support available for residents in their own locality, promoting community-based solutions and reinforcing the role of residents in shaping their own well-being.
9. To plan and organise own work and coordinate with team members across all teams to complete the work within a set framework, standard and timescale.
10. To serve as the office-based point of contact for local issues and improvements, providing support for team morale and well-being in the workplace. Collaborate with colleagues across different directorates and act as the key liaison for raising concerns or recommending improvements in each locality.

Please note: Annual targets will be discussed during the appraisal process.

Key Facts and Figures of the Post

- **Budget Responsibilities:** N/A
- **Staff Management Responsibilities:** No direct Line Management responsibility, but will provide instruction, support, and training in areas of work as necessary
- **Other:** N/A

Essential Criteria

Qualifications: (Required qualifications for the post)

- NQF or NVQ Level 3, or equivalent experience or knowledge in the relevant work area

Knowledge: (Essential knowledge required for the post)

- ICT competent with skills relevant to customer services
- Knowledge of statutory guidance relating to service provisions within Customer Engagement

Experience: (Essential experience required for the post)

- Experience of working within an office environment
- Proven experience of using databases and customer relationship management systems
- Delivering enhanced customer service in a non-judgemental way.
- Application of procedures in specialist service areas

Expertise: (Essential expertise required for the post)

- Ability to work competently within a complex service area, utilising multiple channels and technology, following established processes and procedures
- Ability to record, maintain and communicate complex information accurately
- Ability to work flexibly to meet demands across the service area
- Ability to apply legislation across varied service areas

Disclosure and Barring Service (DBS) Checks

- This post does not require a DBS check

Job Working Circumstances

Emotional Demands

Occasionally dealing with:

- Complex behaviours from members of the public and/or challenging situations
- Some general abusive language and aggressive behaviour witnessed and directed at the post holder as the representative of the Council
- Working in a high pressurised environment due to volume of workload
- Subject to detailed information regarding vulnerable customers and their personal circumstances

Physical Demands

- Working at a computer screen for long periods of time

Working Conditions

- Office/Hybrid environment sometimes dealing with sensitive matters.

Other JWC Factors: N/A

Other Factors:

- Travelling to various locations to support colleagues and customers in Westmorland and Furness Council
- To model and display the corporate standards of behaviour
- Willingness to undertake training to support delivery of the service
- Willingness to support emergency response activity