

Job Description

Customer Case Manager

Charitable Operations Department

Purpose of the role

To provide support to customers by taking responsibility for the end-to-end management of their case and making sound decisions based on individual customer situations and business needs

Key Accountabilities

Customer Service

- Proactively engage directly with customers via telephone or through written correspondence.
- Ensure the details of each case are thoroughly understood and considered.
- Work with Scheme Partners and managers in the handling of sensitive or high profile cases.
- Accurately use data to investigate cases relating to Motability vehicles.

Case Management

- Ensure detailed case notes are compiled accurately and relevant databases updated and maintained in line with data retention and data protection guidelines.
- Proactively keep customers, colleagues and third parties up-to-date with the progress of cases.
- Manage caseloads effectively and follow through on actions required, in line with performance objectives.

Decision Making

- Investigate all cases thoroughly, understanding the root cause of issues or problems in order to provide the right resolution.
- Operate sound judgement and decision making – ensuring we balance the needs of the customer with the needs of the Scheme.
- Take ownership and responsibility for decisions and actions taken.

General

- Proactively identify opportunities for continuous improvement – ways in which we can work better for our customers and the Scheme.
- Participate in other projects and initiatives as required.

Critical Competencies

Customer Focus and Communication

- Treat customers as individuals and take time to understand their situation.
- Be sensitive and tactful – addressing objections in a constructive way.
- Ability to listen actively and effectively.
- Follow things through until their conclusion – delivering on promises made.

Teamwork

- Readily contributes to team initiatives and team meetings.
- Shares knowledge and information with colleagues.
- Willingly assists others.
- Cooperates with other departments and service providers.
- Is prepared to take on extra tasks in order to support the team.
- Treats team members fairly and with respect.

Personal Organisation

- Ability to organise own workload.
- Plan and organise priorities in order to meet deadlines and to achieve objectives.
- Pays attention to detail and checks accuracy of own work.

Problem Solving and Decision Making

- An analytical, detailed and methodical approach to problem solving.
- Ability to ask pertinent questions and get a thorough understanding of a situation.
- A balanced and considered approach to decision making using initiative where appropriate.
- Being decisive and able to support decisions with sound judgement and facts.

Experience and Track Record

Essential:

- Experience in a customer focused environment.
- Experience in investigation and information gathering.
- Excellent verbal communication skills.
- Excellent written communication skills.

Desirable:

- Regular customer contact via the telephone.
- Experience of dealing with customer complaints.
- Case management experience.
- Experience of working with high levels of caseloads and data.

Capabilities Profile – Technical Skills/Knowledge

Essential:

- Working knowledge of Microsoft Office i.e. Word, Excel, PowerPoint and Outlook.
- Ability to accurately compose letters and case notes.

Desirable:

- Experience of using customer databases
- Knowledge or experience of disability

Reporting line

Reports to: Charitable Operations Team Manager

Resources, scale and scope of role, location and any travel factors:

- A sound knowledge of the Motability Scheme and the internal and external organisation is required to be able to do the job effectively and provide the correct information to enquiries.
- The role is predominantly based In Harlow, Essex at Motability's offices. Some travel may be required for training and off-site meetings. Working from home may factor in the role with face-to-face contact being maintained.
- Job holder is expected to check their own work to ensure standards are maintained.
- Job holder must take reasonable care of their own health and safety and that of others who may be affected by their actions, and must comply with all safety instructions or procedures. All equipment is to be used in a safe manner.