

## Job Description

# Grants Enquiry Advisor

### Purpose of the role

Responsible for answering and resolving multi-channel contact and taking ownership for delivering a high quality service to our disabled beneficiaries. Working within a fast-paced environment, dealing with a wide range of enquiries regarding grant-making and our charitable activities.

### Key Accountabilities

#### Beneficiary Service:

- To act as the first point of contact for beneficiaries, dealing effectively with requests, answering queries and taking responsibility for processing each enquiry through to a satisfactory conclusion.
- To work with internal departments to ensure beneficiary experience is at the highest level.
- To contact beneficiaries in accordance with agreed procedures.
- To continuously improve the service we offer by providing feedback on trends and improving own approach based on beneficiary feedback and call monitoring.
- To follow our GET principles (Get me, Get the plot, Get it done and Get in control) to deliver excellent telephone communication.

#### Contact Management:

- Ensure case notes are compiled accurately and relevant databases updated and maintained, in line with data retention and data protection guidelines.
- Ensure beneficiaries are fully appraised of next steps and understand resolution proposed.
- Manage beneficiary interactions effectively and follow through on actions required, in line with performance objectives.

#### Decision-making:

- Investigate all contact from beneficiaries 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 beneficiary/ potential beneficiary with the needs of the Charity.
- Take ownership and responsibility for decisions and actions taken.

#### General:

- Proactively identify opportunities for continuous improvement and ways in which we can work better for our beneficiaries and the Charity.
- Participate in other projects and initiatives as required.
- Support business requirements and, where necessary, provide support to other areas of the business.
- Provide administrative duties as required.



## Critical Competencies

### Beneficiary Focus and Communication:

- Treat beneficiaries as individuals and take time to understand their situation.
- Be sensitive and tactful. Address objections in an assertive and constructive way.
- Ability to listen actively and effectively. Follow things through until their conclusion, delivering on promises made.

### Teamwork

- Readily contribute to team initiatives and team meetings.
- Share knowledge and information with colleagues.
- Willingly assist others.
- Cooperate with other departments and service providers.
- Be prepared to take on extra tasks in order to support the team.
- Treat 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.
- Demonstrate resilience to daily challenges.

### 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.
- Ability to deal effectively with objection handling.

## Experience and Track Record

### Essential:

- Experience in a high volume contact centre environment.
- Experience in investigation and information gathering.
- Excellent verbal communication skills.
- Excellent written communication skills.

### Desirable:

- Experience of dealing with frontline customer complaints.
- Case management experience.
- Experience of working with digital channels such as webchat and email.



## 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.
- Experience of using customer databases (CRM).
- Ability to work from home, when required.

### Desirable:

- Knowledge or lived experience of disability in either personal or professional life.
- Experience of working remotely.

## Reporting line

Reports to: Charitable Operations Team Manager, Charitable Operations

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

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.

A sound knowledge of the Motability internal and external organisation is required to be able to do the job effectively and provide the correct information to enquiries.

