

MEMBERSHIP ADVISER

JOB DESCRIPTION

Reports to:	Membership Manager
Annual salary:	£19-22k
Location:	Kingston upon Thames
Working hours:	Monday – Friday 9-5
Contract period:	Permanent

The majority of time will be spent dealing with new or existing membership enquiries although some time will also be required to support the manager on ad hoc tasks and Society wide projects.

Membership enquiries

Dealing with customer enquiries regarding all CS Healthcare products/services within agreed service standards:

- Process new quote requests received by web site, coupon, or letter, including input and update of data on membership database. Assist with daily information requests via post and/or email.
- Assist the Membership & IT Support Adviser in system development and/or system testing when required
- Respond to telephone enquiries for new quotations and advice on cover/costs/payment methods
- Follow up of enquiries by phone or letter and assisting in re-mailing/emailing activities when necessary to convert enquiries
- Provide existing members with advice on changing policies, changing payment methods, adding dependants, bereavement and dependants becoming members
- Enter or check new member/additional details on main membership database
- Produce and send new member policy document packs
- Process resignations/cancellations, including provision of alternative quotes to retain members where possible
- Liaise with Finance and Healthcare Services where necessary
- Respond to enquiries and requests for information by letter, e-mail or phone
- Responsible for new business scanning and filing.
- Deal with customer complaints/suggestions in compliance with Society policy
- Manage daily membership post including franking and bagging of post for collection by Royal Mail/courier
- Adhoc collation of new member, renewal and quote packs.

The membership adviser will also assist in one or more of the following areas of work:

Renewals

Assist in running the renewals process to issue renewal invitations and monthly renewal packs for existing members.

Project work

Assist in development of new systems and procedures to improve overall performance of department and delivery of customer service to members.

Procedure manuals

Assist in the updating of procedure manuals.

MEMBERSHIP ADVISER

PERSON SPECIFICATION

Knowledge & Experience	Essential	Desirable
Educated to GCSE/O level and A level (or equivalent) standard including English Language & Mathematics at GCSE	X	
Experience of working in a tele-sales operation or customer sales/support environment	X	
Experience of data input and amendment on customer databases or Excel and mail merging to produce letters		X
Knowledge of health/insurance/financial services market		X
Knowledge of regulatory/compliance requirements (FSA, FOS, ICOB)		X
Experience of using IT systems and databases	X	

Skills & Abilities	Essential	Desirable
Understanding and application of consultative sales skills – i.e. active listening, empathy and sale closing questions	X	
Good verbal and written communication skills	X	
Good team member	X	
Confident and approachable telephone technique	X	
Confident in using IT systems		X

Personal Attributes	Essential	Desirable
Enthusiastic and energetic self starter	X	
Organised and timely	X	
Self motivated	X	
Perseverance and tenacity		
Real interest in working in the insurance industry/small friendly Society	X	
Professional attitude	X	
Willingness to undertake training & progress knowledge	X	
Open & communicative style with all levels of the organisation and external contacts	X	
Willingness to work towards a CII qualification		X