

***Job Description for: Customer Administrator***

**November 2021**

**THE EMPLOYER:** Cumbria Action for Sustainability (CAfS).

**LOCATION:** Contractually based at our office, Eden Rural Foyer, Old London Road, Penrith, CA11 8ET, however, homeworking can be agreed.  Occasional meetings required at venues across Cumbria

**REPORTS TO:** Project Manager – Cold to Cosy Homes.

**HOURS:** 22.5 to 30 hours per week, with flexibility to work across 3, 4 or 5 days

The working times are flexible but must include core office hours of 10am-3pm unless agreed otherwise. There may also be occasional need to work evenings/weekends for event or meeting support.

**START/END DATE:** Start as soon as possible. Fixed-term contract to Dec 2022 (with potential for extension subject to funding).

**SALARY RANGE:** £18,796 to £22,352 FTE (£15,036 to £17,881 for a 30-hour week).

**LEGAL RIGHT TO WORK**: You must have a legal right to work in the UK as CAfS is not in a position to act as a sponsor.

**APPLICATIONS BY:** Apply using the CAfS application form. CVs will not be considered. **Application forms must be received by 9am on 4 Jan 2022.**

**INTERVIEWS:** Interviews will be held on **10 Jan 2022.**

Interviews will be via Zoom. The interview process will involve one or more tasks relating to the role. Candidates shortlisted for interview will be contacted by 9am on 7 Jan 2022.

**ABOUT CAfS**

**Our vision** is a zero carbon Cumbria, and we strive to bring about a better way of life, in balance with our environment.

**Our mission** is to empower and enable people, communities and businesses to live and work more sustainably by sharing our knowledge, practice, skills, networks and practical experience. We manage and deliver events, advice, training and practical projects across the county as well as providing specialist consultancy services to enable individuals, communities, businesses and local authorities to drive a shift towards a Zero Carbon Cumbria.

We are expanding our Cold to Cosy Homes service in order to deliver more free home energy advice support across all districts of Cumbria. The service supports vulnerable people who may be living in cold, draughty or damp homes.

Our Cold to Cosy Homes service includes:

• Advice about home energy efficiency over the telephone and in-home by trained CAfS employees and contractors.

• Events and training about home energy efficiency for householders and volunteers.

• The installation of energy measures such as draughtproofing, low energy light bulbs and insulation by professional installers.

We also increasingly offer a range of commercial services to householders for energy audits and advice.

This job description is not exhaustive but is provided to assist the postholder to know what the main duties are. It may be amended from time to time without change to the levels of responsibility appropriate to the grade of the post and in discussion with the postholder.

**MAIN PURPOSE OF ROLE:**

The role is to:

* Assist the Cold to Cosy Homes team to deliver free home energy advice and paid services.
* Provide excellent customer service to our clients, including vulnerable customers.
* Deliver a range of administrative duties in support of the project team.

**MAIN TASKS:**

* To provide the first point of contact for clients by telephone, email and online application forms.
* Handling enquiries and requests, ensuring accurate input of client details onto the customer relationship management (CRM) system or passing on messages as necessary.
* Processing client referrals by inputting information onto the CRM system or other external databases.
* Booking and amending energy advice calls/visits via the CRM system and Outlook calendars of team member’s and contractors and providing confirmation to the client.
* Assisting in the coordination of draughtproofing installation visits, including telephoning clients to arrange, referring to contractors and updates of installation records.
* To provide support to events. To include administering bookings on our website and CRM, managing sign-ins, preparing and packing event kit, setting up rooms and attending where required.
* To provide support for the ongoing implementation and compliance of GDPR requirements and the CRM system.
* To undertake additional administration tasks as directed by the relevant staff member, including but not limited to: ordering equipment and stationery, meeting administration, providing client data for update reports
* Undertake relevant training to ensure continued personal development relevant to the area of work.
* Perform other duties that may be required from time to time.

**Customer Administrator**

***Person Specification***

**Essential criteria**

To be able to demonstrate:

* Excellent customer service, especially providing excellent service.
* Experience in providing administrative support in a dynamic and demanding environment.
* Excellent customer skills in telephone call handling as well as online enquiry handling.
* Experience of recording data in customer relationship management systems.
* Ability to proactively handle a wide range of tasks and prioritise these effectively.
* Willingness to learn about issues affecting vulnerable clients in heating their home, reducing costs and becoming more sustainable.
* Ability to use initiative and make effective decisions.
* Ability to use a comprehensive range of IT systems (Microsoft Word, Excel and customer relationship management) and the willingness to train in additional IT skills as and when required.
* Accuracy and attention to detail, and the ability to work to tight timeframes.
* A good level of numeracy.
* Good written and proofreading skills.
* Tact, patience and diplomacy.
* Ability to maintain a sensitive and professional approach towards colleagues and service users, mindful of confidentiality and anti-discriminatory practices.
* Empathy with CAfS aims values and objectives.

**Desirable criteria**

To be able to demonstrate:

* Experience of data gathering, analysis and reporting e.g. customer data.
* Experience of working in a dispersed team and using Microsoft Teams or similar.
* An understanding of energy efficiency in the home.
* An understanding of the work of CAfS and the impact of climate change on the environment and economy.
* Experience of Charitylog CRM system.

If you would like more information about the role, please email: [gareth.field@cafs.org.uk](mailto:gareth.field@cafs.org.uk)