

Job Description

Job title: Customer Income Advisor

Accountable to: Customer Accounts Manager

Job Purpose:

You will be accountable for delivering a sector leading, comprehensive, high quality, supportive, customer-centric, money management and welfare benefit advice service to Sovereign's customers within a defined locality. Whilst championing our values of being kind, respectful, inclusive, ambitious, responsible, and collaborative.

You will also be responsible for maintaining high data quality in our Customer Accounts Service. Ensuring that data is held centrally for full transparency and that suitable contract arrangements are in place for the continued management all compliance elements within your defined areas.

Dimensions:

Financial responsibility: N/A

People responsibility: N/A

Autonomy: Within broad direction set by the Head of Customer Accounts who is setting the delivery strategy, the role is responsible as part of a wider team for ensuring tenancies are sustained by proactively working with customers across a defined locality, co-creating the customer success map with customers, providing support and advice on money management, money savings, welfare benefits, signposting or referring to other supportive interventions both internally and externally.

Key Accountabilities:

- To take responsibility to deliver the right outcome for our customer in a safe and timely way.
- Demonstrate everyone safe and well everywhere, every day by making health and safety a primary consideration in your decision making
- Provide training, information, and support to colleagues, so that they're kept up to date with welfare reform and benefit changes and with money advice issues.
- Support the achievement of the agreed set of performance targets both for your team and for your locality
- Establish and maintain own effectiveness by developing working relationships with all stakeholders, ensuring integrated contribution to Sovereign's corporate objectives whilst observing Sovereign's policies, procedures, and ways of working

- Develop own capability through continual personal and professional development that will assist in improving own performance in the role, ensuring all core and mandatory training is completed and kept up to date.
- Undertake other duties within the level of responsibility, to meet the changing needs of the organisation

Key Deliverables

- Provide comprehensive money tips and advice and welfare benefit advice to customers, including customers who may be vulnerable such as mental illness, learning difficulties, age, etc.
- Facilitate co-created success maps with your customers and deliver outcomes that relate to the HACT social value measures.
- Complete thorough Income and Expenditure statements with customers to enable accurate benefit entitlement calculations to be completed.
- Liaise, refer, and work in partnership where necessary to appropriate agencies and partners, both internal and external. Including but not limited to Housing Benefit, Department of Work and Pensions, Homelessness, Social Services, Floating Support Providers, Independent money, debt, or legal advice services.
- Signposting or refer to other supportive interventions both internally and externally
- Maintain an up-to-date knowledge of welfare benefit regulations and be able to give accurate advice and assistance, including overpayment queries and appeals
- Hold the Data Steward role for data quality related to Customer Accounts as set out in Sovereign's data landscape. Ensure accurate records are maintained in line with business processes and comprehensive notes are made relating to case management, customer contact, customer outcomes and maintain a database of external referrals
- Ensure that customer cases are handled promptly, sensitively and are managed in an effective and efficient way to allow customers ample opportunity to engage with the service but so that cases are closed at the appropriate time.
- Promote a positive collaborative culture of Building Safety and Compliance. Take personal responsibility for escalating any concerns to the Building Safety & Compliance Team for consideration and/or investigation.

Knowledge & Skills:

- Maintain an up-to-date knowledge of welfare benefit entitlements and be able to give accurate advice and assistance, including overpayment queries and appeals.
- Maintain an up-to-date knowledge of local grants and funding that may be applicable to a customer's circumstances.
- Maintain an up-to-date knowledge of best practice and internal policies and procedures relating to arrears prevention and collection
- Ability to impact assess and to understand the difference between 'major' and 'minor' data issues.
- Knowledge of methods to monitor the quality of data and identify issues e.g. reconciliations

Version	Job code	Author	Date created/modified	Effective date
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