

Customer Service Advisor - Job Description

Purpose of the role

Our Customer Service Advisors are often the first people our customers speak to and that first conversation can make all the difference. Whether it is helping vulnerable clients arrange home repairs, processing referrals from health professionals, or guiding potential clients through our wider services, this role is about more than just answering calls. It's about listening, showing empathy, and making sure every customer feels genuinely supported and treated with dignity.

You'll also be confident in addressing complaints, aiming to resolve them wherever possible at first contact, while knowing when to escalate appropriately. Similarly, you'll be alert to potential issues such as safeguarding concerns, recognising when to raise them for further action. You will work closely with teams across the organisation but most importantly, you'll partner with our Maintenance Technicians, coordinating their schedules to ensure repairs happen smoothly and on time.

More broadly, call after call, the purpose of the Customer Service Advisor role is to help WECHI to:

- Deliver our vision that all homes enable safety and wellbeing and to deliver our mission to improve homes so people can live independently for as long as possible.
- Deliver against our strategic priorities which include:
 - Providing excellent quality services to improve homes and enable people to live independently as long as possible.
 - Retaining our Local Authority contracts.
 - Diversifying our revenue generating and funding sources to ensure future sustainability and the freedom to meet the needs of our local communities.

- Influencing change at a sector level including advocating and spearheading broader collaboration and enhancing the positive impact on our local communities.
 - Ensuring WE Care is a great place to work, has strong foundations and works efficiently.
- Contribute towards the sustainability and long-term viability of WECHI in-line with the organisation's strategy.
- Actively role model and promote WE Care's values:
 - We are experts
 - We are resourceful
 - We are caring
 - We act with integrity
- Uphold the values and reputation of WE Care and be an ambassador for organisational policies and practices including equal opportunities and confidentiality.

Role specific responsibilities

- Act as the first point of contact for customers, carers and health professionals across phone, email, and in-person when covering reception.
- Provide clear, empathetic support and guidance tailored to each enquiry.
- Assess incoming enquiries to determine the appropriate action, such as referring to the Project Management Team, scheduling with the Handyperson Service, or escalating to the Information & Advice Lead or a manager, and accurately log all details using our internal databases, Microsoft 365, and CRM systems to maintain up-to-date records.
- Support with resolving enquiries and complaints at first contact, escalating when necessary.
- Coordinate and schedule jobs for Maintenance Technicians using the company's scheduling system. Escalate any performance, conduct, or job completion concerns to the Customer Support Manager for follow-up.
- Re-booking of Maintenance Technicians work - ensuring clients are advised in a timely fashion when Maintenance Technicians sickness causes their work to be rearranged.
- Monitor and follow up with private-pay customers throughout their journey.

- Take payments over the phone and log remittances received by other means.
- Send service information to clients via email or post as required.
- Work together with the allocated Maintenance Technician to produce quotes and estimates on surveyed work, including VAT.
- Carry out general administrative tasks including filing, photocopying, and processing post.
- Identify and escalate any safeguarding concerns to our Safeguarding Lead appropriately.
- Build and maintain positive working relationships with colleagues, contractors, and health professionals to support seamless service delivery.

General Duties and Responsibilities

- Be a positive advocate for the organisation, representing our values in your daily work.
- Take responsibility for completing all required training and staying up to date with policies and procedures.
- Demonstrate professionalism and respect at all times by following organisational policies, maintaining confidentiality, promoting equality, diversity and inclusion, and upholding health and safety standards.

Other responsibilities:

WECHI requires all roles to work flexibly in line with the various and changing needs of the organisation. As such, there may be times when you are required to take on additional responsibilities as they arise. Any such changes will be communicated as a two-way dialogue and the impact will be discussed.

Reports to:

- Head of Customer Support & HP Service
- Customer Service Deputy

Person Specification - Experience, Skills and Personal Attributes

You will have demonstrable experience of effectively:

Experience / Qualifications	Essential	Desirable
Being qualified or having relevant experience in your professional field with GCSE's level C or above in English and Maths.	X	
Relevant qualifications in customer service and/or administration		X
Experience working in a customer service, office administration and reception environments.	X	
Awareness of and commitment to safeguarding principles to protect vulnerable individuals.		X
Experience of working with older and/or disabled people		X

You will be able to demonstrate the following skills effectively:

Skills	Essential	Desirable
Ability to communicate effectively at all levels in a calm and courteous manner, providing a warm and welcoming telephone and reception service.	X	
Excellent written and oral communication and keyboard skills with attention to detail and accuracy.	X	
Ability to utilise specialist database programmes, Microsoft Word, Excel, and other relevant software to full potential.	X	
Comfortable with CRMs systems such as EPIX, Charity Log, D365 and other scheduling tools		X
Good literacy, numeracy, and organisational skills.	X	
Ability to prioritise own workload and to work well under pressure and within deadlines.	X	

You will need to demonstrate:

Personal Attributes / Values / Behaviours	Essential	Desirable
Able to work independently and as part of a team.	X	
Ability to use own initiative and apply common sense and practical problem-solving in a variety of situations.	X	
Take ownership over decision making and time management.	X	
Flexible attitude to work and a willingness to adapt to an evolving role.	X	
Respond resiliently to change.	X	
Show empathy and compassion in interactions with customers, particularly those who may be vulnerable, older, or disabled.	X	
Demonstrate professionalism and respect in all interactions with customers, colleagues, and external partners.	X	
Demonstrate proactive problem-solving skills to identify and resolve customer or operational issues effectively.	X	
Work collaboratively while adhering to organisational policies, procedures, and standards.	X	
Demonstrate accountability and integrity in delivering reliable, transparent, and ethical service.	X	
Communicates honestly and constructively, giving and receiving feedback.	X	
Committed to organisational values, diversity, and inclusion.	X	
Commitment to continuous learning and improvement.	X	

What's in it for you?

As an internal recruitment opportunity, this secondment means you will retain your continuous service benefits such as annual leave and length of service. This is in addition to the below terms and conditions:

Salary: £26,227.50

Location: Hybrid working – between home and the Bristol office. The requirement is to work in our Bristol office for a minimum of 3 days a week.

Contract hours: 37.5 hours per week (Monday to Friday).

Contract type: 1x Permanent.
1x 12-month fixed term (maternity cover)