

POSITION DESCRIPTION

General Information	
Position Title:	Customer Engagement Specialist
Incumbent:	
Function & Team/Program:	Retention of Sponsors through customer service and proactive service contacts. Maximising revenue through proactive service and sales contacts to our Supporters.
Location(s):	National Office
Manager's Position Title:	Customer Support & Engagement Team Leader
Manager's Name:	Athanasia Gonzalez
Date Prepared:	19/03/2024
Prepared By:	Dylan Rose
Approved By:	Lisa Allan

Primary Purpose of this Position (<i>In one sentence - why does the role exist?</i>)
A customer support and engagement specialist role is to ensure customer satisfaction and loyalty. These specialists play a crucial role in addressing customer inquiries, concerns, and issues promptly and effectively. By providing excellent support and engagement, they can enhance the overall customer experience, leading to higher retention rates and increased brand loyalty.

Scope	
Direct Reports to this Position By Position Title	Indirect Reports Total Number
1. N/A 2.	
Financial Dimensions controlled by this Position (<i>Include key financial metrics such as revenue growth, income & expense budget, etc</i>)	
Direct control	Indirect control
e.g. Revenue, Operating expenditure, Capital expenditure, etc • Fundraising and sponsorship income	• Cost reduction per call through efficient handling of incoming calls

Setting Priorities (<i>how is work prioritised</i>)	
How often does employee prioritise their own work? Eg. Daily, weekly, monthly, annually, other	Daily

How often does employee determine the priorities of others? Eg. Daily, weekly, monthly, annually, other	NA
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Key Relationships (*Who does the role interact with? List the titles of individuals, departments and organisations frequently interacts with*)

Internal	<ul style="list-style-type: none"> • Data Maintenance & Care team • Customer Administration team • Business Information Systems Team • Community Programs team • <i>Learning for Life</i> Workers • Corporate and Community Fundraising • Campaign Marketing team • Communications team
External	<ul style="list-style-type: none"> • <i>Learning for Life</i> sponsors • The Smith Family supporters (incl. prospective)

Key Responsibilities / Accountabilities (*List the major areas from largest % of job to smallest*)

Major Area: Outgoing Calls for Fundraising Campaigns		% of Job: 50
i)	Initiate outbound calls to engage with supporters, thanking them for their past contributions and informing them about ongoing and upcoming fundraising campaigns and events.	
ii)	Effectively communicate the impact of their donations and encourage continued support for the charity's initiatives.	
iii)	Maintain individual & team campaign KPIs	
iv)	Increase revenue and supporter retention through ongoing campaigns	
Major Area: Ensure high levels of Inbound Customer Service		% of Job: 20
i)	Respond promptly and courteously to inbound inquiries received via phone, email, live chat, and social media channels.	
ii)	Demonstrate a deep understanding of the charity's mission, programs, and campaigns to provide accurate and informative responses to supporters' questions.	
iii)	Maintain a high level of professionalism and empathy when assisting supporters with donation processing, event registrations, and general inquiries.	
iv)	Document all interactions and inquiries in the customer relationship management (CRM) system for future reference and analysis as per established procedures.	
v)	Maintain individual & team KPIs	
Major Area: Complaint Resolution		% of Job: 20
i)	Handle complaints and escalations with professionalism, empathy, and a commitment to finding satisfactory resolutions for all parties involved.	

ii) Act as a liaison between supporters and internal teams to address issues related to donations, event participation, and other concerns. iii) Follow processes to document complaints, resolutions, and any necessary follow-up actions in the CRM system to track trends and identify areas for improvement.	
Major Area: Feedback & Process Improvement	% of Job: 10
i) Gather feedback from supporters regarding their experiences and suggestions for improvement and ensure these are passed on to relevant internal team members for action as per established processes. ii) Work with the team to implement process changes aimed at enhancing customer satisfaction and operational efficiency.	

Qualifications, Experience and Competencies: <i>(What background, knowledge, experience or competencies are required to perform the role at the expected level?)</i>		
Education / Qualifications / Memberships:	Essential	Desirable
	<ul style="list-style-type: none"> • • 	<ul style="list-style-type: none"> • Customer service and sales qualifications • Time management training
Experience:	Essential	Desirable
	<ul style="list-style-type: none"> • Customer service • Sales Experience 	<ul style="list-style-type: none"> • Telephony/call centre experience •
Competencies:	Essential	Desirable
	<ul style="list-style-type: none"> • accountability for work outcomes • respect for individual differences and dignity • demonstrated commitment to learning, developing skills and sharing knowledge and information • working in partnership with others (teamwork) • flexibility to accommodate change • working safely 	<ul style="list-style-type: none"> • High level competency in typing skills • Time management • Ability to work autonomously