
University of Sunderland

Role Profile

Part 1

Lifechanging



**University of
Sunderland**

Job Title:	Customer Relationship Management (CRM) and Helpline Assistant
Reports to:	CRM Officer
Grade:	Grade B
Working Hours:	37
Faculty/Service:	Marketing and Recruitment
Location:	Edinburgh Building, City Campus
Overall Job Purpose:	This role reports directly to the CRM Officer. Its main focus is to provide a first class customer service experience via a range of platforms including social media, email, telephone, and live chat. The role also contributes to marketing, student recruitment and conversion campaigns using CRM systems and is responsible for maintain and updating data.
Key Tasks and Results:	<ul style="list-style-type: none">• To be the first point of contact for enquirers providing accurate information about the university including course fees, course information, accommodation, student finance etc. and to respond to incoming inquiries across digital channels, print, email and in person when required.• Monitor enquiry content and frequency to establish comprehensive FAQs and to take responsibility for personal development to ensure the highest standard of knowledge possible across the vast array of subject matters.• To resolve enquiries with timely and effectively. relating to, but not limited to, accommodation, finance, international, admissions, course fees, course content and scholarships acting as first point of contact and taking responsibility for the enquiry from beginning to end, referring to more specialist support when necessary.• To assist in the planning, organising and delivering of outbound call centres which contribute to the strategic objectives of the team and service, using relevant data to prioritise and pro-actively target prospective students.• Update and maintain accurate records for enquirers, applicants and other target audiences in the CRM system.

- To respond to requests for CRM communications, by editing copy and positioning images whilst adhering to the brand and tone of voice of the University.
- Undertake CRM duties such as, maintaining filters and retrieving information from large datasets to ensure effective segmentation of records for specific messages and campaigns.
- To carry out regular data cleansing tasks of the CRM system.
- Responsible for the planning, co-ordination and reporting of individuals tours. Proactively identify recruitment leads and promote the service to enquirers and be responsible for 'keeping warm' such leads.
- Deliver individual tours, including city, campus and accommodation tours.
- Collect specific data which feed into management reports and provide analysis of data for specific channels.
- Adhering to continuous improvement and customer satisfaction principals by monitoring performance and analysing feedback.
- Be and advocate for the University, positively promote the service and provide for the 'personalised journey' aspirations of the Strategic Plan.
- Contribute to marketing campaigns and CRM-driven initiatives as directed by the Campaign and Conversion Manager.
- Promote the work of the Campaign and Conversion team and good practice to internal and external groups and individuals.
- To understand and support a culture which supports University priorities, including:
 - responsiveness
 - excellence in customer service and valuing the importance of delivering services of the highest quality
 - ownership of actions;
 - adaptability & a 'can do' attitude
 - strong communication
 - innovation
 - inclusiveness
 - collaboration and working across team boundaries to build & strengthen working relationships
 - offering challenge appropriately to ensure processes are considered and robust
 - flexibility of approach
 - being student-centric
- Contribute to the efficient functioning of the team, department and service as directed by the Campaign and Conversion Manager.
- Undertake any other duties deemed to be commensurate with the post that will contribute to effective and efficient service delivery.
- Undertake and support staff development as appropriate
- Represent the university when required to assist and support key recruitment events such as Open Days and Clearing. To support the Client Relationship team by attending key recruitment events such as when key subject area knowledge is required or additional personnel will benefit the customer experience and deliver the key brand and subject selling points

Special circumstances:

A flexible approach is required. This post will require working additional hours (including weekends and evenings) at key periods during the year. DBS clearance may

be required in order to carry out this role. Occasional regional and national travel will be required.



**Part 2A
Qualifications, Experience
and Expertise:**

Essential

Qualifications and Professional Memberships:

- Educated to A-level or equivalent, or possess significant relevant professional experience within a similar role.

Experience:

- Proven experience of working effectively in a customer support environment with an ability to provide a high standard of customer care and advice
- Demonstrable diplomacy skills between various levels of an organisation
- Familiar with using multiple business systems
- Experience in using and maintaining customer focused databases in a higher education, public sector or commercial environment.
- Proven experience of working within a role that requires effective planning and organisational skills, strong attention to detail and an ability to negotiate, persuade and influence.

Key Knowledge and Expertise (specific):

- Ability to build and develop relationships with a wide range of individuals and teams.
- Take ownership of issues ensuring their effective resolution
- Knowledge of the UK higher education sector and how institutions use student data to meet institutional aims and objectives.
- Ability to work flexibly and think on your feet.
- Ability to pay attention to details and work under pressure to tight deadlines.
- Ability to work as part of a team, but also have the confidence to work independently (and plan/organise own workload).
- Ability to adapt a flexible approach to the demands of a dynamic environment in order to accommodate changes in priorities when required.
- Proven IT skills within a wide range of packages, specifically Microsoft Office, including Word, Excel, PowerPoint and Outlook.

Part 2B
Key Competencies:

Competencies are assessed at the interview/selection testing stage

- Analysis & Research**
- Uses appropriate sources of data to answer questions
 - Gathers data systematically
 - Carries out analysis accurately and methodically

- Communication**
- Non-routine matters are clarified
 - Complicated matters are explained clearly
 - Content of message is structured logically
 - Is able to understand, use and explain technical terms commonly in use in own area of work
 - Responds appropriately to requests for information
 - Information and messages are conveyed accurately and promptly

- Planning and Organising Resources**
- Prioritises work to achieve objectives to the standards expected
 - Proactively works with others achieve their and the team’s objectives
 - Takes steps to reduce the waste of resources

- Service Delivery**
- Provides accurate and timely information
 - Correctly refers customers elsewhere
 - Has accurate knowledge of services available in own and related areas of work
 - Learns from complaints and takes action to resolve them

- Work Environment**
- Follows good practice guidance and complies with health, safety and welfare policies
 - Accepts responsibility for the effect actions may have on others

Date completed:

January 2017