



GUILDFORD  
B O R O U G H

**Customer Services Team Leader**  
**Customer Services & Tourism Team**  
**Leader**  
**Customer Services Advisor**  
**(FG20 SD03)**



<b>Job Title</b>	<b>Customer Services Advisor &amp; Customer Services (&amp; Tourism) Team Leader</b>
<b>Service Area</b>	<b>Customer &amp; Digital Services</b>
<b>Grade</b>	<b>Customer Services Advisor L1 – Grade 3</b> <b>Customer Services Advisor L2 – Grade 4</b> <b>Customer Services Advisor L3 – Grade 5</b> <b>Customer Services Team Leader – Grade 6</b> <b>Customer Services &amp; Tourism Team Leader – Grade 6</b>
<b>Job Reference</b>	<b>FG20 SD03</b>

<b>Reporting to</b>	<b>Responsible for</b>
Customer Services (& Tourism) Team Leaders reports to Head of Customer, Case & Parking Services	Customer Services (& Tourism) Team Leader responsible for Customer Services Advisors
Customer Services Advisor reports to Customer Services (& Tourism) Team Leaders	Not applicable

<b>Team Purpose</b>
Ensuring a swift and efficient customer experience; understanding when and how to build self-serve capability as well as tailor exceptional advice and guidance to put customers first.

<b>Role Purpose</b>
<p><b>Customer Services Advisor:</b></p> <p>The postholder will provide a high standard of customer service for all customers of the Council ensuring detailed and accurate records are kept using appropriate IT systems. Customer enquiries will cover a wide range of council services and the postholder will have the skills and knowledge to provide correct and timely advice, resolving queries and cases quickly and efficiently. The postholder will handle the customer interaction through to completion wherever possible, in line with established procedures, escalating cases to the Customer Services Team Leader or to other teams as required. The postholder will promote self-service and digital channels at all times ensuring a professional, inclusive and helpful approach to customer service.</p>



**Customer Services (&Tourism) Team Leader (in addition to the above):**

The postholder will support the Head of Customer, Case & Parking Services in the day to day management of the teams to ensure work processes, standards and compliance are maintained and continuously improved. The Team leader will ensure advisors are trained to a high standard and can undertake their role, as well as address any performance issues as they arise quickly and in accordance with policies.

**Key Accountabilities**

**Level 1:**

- Process a wide range of customer queries and transactions, providing clear, accurate and timely advice or guidance in accordance with policies and procedures
- Ensure accurate and detailed records are kept in line with procedures and data protection
- Act as the first point of contact for the majority of customers and refer cases to Case Services as appropriate
- Ensure all customers are treated fairly and provide support and advice based on their individual needs
- Ensure that the customer's preferred method of contact is captured and maintained
- Adhere to legislation, policies, procedures and workflows for dealing with all queries and transactions
- Ensure strict confidentiality is maintained and data protection rules followed
- Identify improvements in customer and service provision
- Proactively market the benefits of digital and self-service channels to all customers
- Actively develop and maintain an extensive working knowledge of council services, IT systems, processes and procedures
- Work with other team members to organise and manage workloads effectively, ensuring that all customer and performance standards and targets are achieved
- Undertake routine and procedural cases that will require some understanding of relevant service processes and compliance, regulations and legislation
- Undertake straight forward cases that will require a good level of understanding of relevant service processes and compliance, regulations and legislation
- Will regularly refer to Team Leaders or CSA level 3 for advice and guidance
- Some requirement to refer to Specialists for case resolution

**Level 2 (in addition to the above):**

- Undertake more complex cases that will require a more detailed understanding of relevant service processes and compliance, regulations and legislation
- Assist in the training, inducting and mentoring of new staff in customer services processes in a specific area
- Will occasionally refer to the Team Leader or CSA level 3 for advice and guidance
- Requirement to refer to Specialists for case resolution, having a good understanding of the handoff points between Customer Services and Specialist teams

**Level 3 (in addition to the above):**

- Owning complex cases that will require a detailed understanding of relevant service processes and compliance, regulations and legislation

- Working with the Team Leaders to promote new ways of working, responsible for multi-skilling people within teams and encouraging knowledge sharing across customer services teams
- Overall responsibility for training, inducting and mentoring of new staff in customer services processes in a specific area – requesting the support of CSA level 2 when required
- Assist Team Leaders in maintaining the reference material available to the Customer Services team, meeting regularly with service area specialists to review and maintain accuracy whilst also identifying upcoming activity which will impact upon customer demand
- Lead on the design and development of tools and guidance notes which enable the team to self-serve and widen their knowledge – requesting the support of other CSAs when required
- To support the Team Leader in the escalation of service issues including more complex customer care issues/enquiries and
- Deputising for Team Leader in their absence

**Customer Services Team Leader (in addition to the above):**

- Promote new ways of working, responsible for multi-skilling people within teams and encouraging knowledge sharing across customer services teams
- To act as lead Customer Services Advisor in one or more areas of specialism, personally owning the resolution of more complex cases
- To support and develop others within the team in the areas of specialism
- Support operational management of the service, including overseeing people and responding to performance information
- To be the main escalation point of service issues including more complex customer care issues/enquiries

**Customer Services & Tourism Team Leader (in addition to the above):**

- Promote new ways of working, responsible for multi-skilling people within teams and encouraging knowledge sharing across customer services teams
- To act as lead Customer Services Advisor with Tourism being the main area of specialism, personally owning the resolution of more complex cases
- To operationally manage staff fulfilling the council's tourism offering
- To support and develop others within the team in the areas of specialism
- Support operational management of the service, including overseeing people and responding to performance information
- To be the main escalation point of service issues including more complex customer care issues/enquiries

**Appointment and progression through grades will be based on the needs of the business**

**Key Objectives**

**Working with customers**

Resolve customer requests professionally, effectively and efficiently. Provide sound guidance and advice and ensure adherence to legislation and regulation. Develop and maintain good working relationships with customers, interacting through multiple channels. Develop and implement plans to facilitate customer engagement



<b>Key Objectives</b>	
	Proactively market the benefits of digital and self-service channels to all customers, taking forward customer enabling opportunities.
<b>Working towards the Corporate Plan</b>	Responsible for delivery of agreed objectives and services associated with the Corporate Plan.
<b>Knowledge of services</b>	Excellent understanding of the technical, statutory and non-statutory, services, initiatives, activities and projects provided across the council and a good knowledge of the terminology and acronyms used by the services.
<b>Using systems effectively</b>	Good IT skills and ability to learn new systems quickly.

<b>Specific Tasks</b>	
<b>Case Management skills</b>	Working efficiently, professionally, paying attention to detail and following workflows when processing cases. Effective case management including handling related cases for a single customer, assessing risk, identifying potential fraud and working on more complex cases in conjunction with Specialists (progression & higher level). Ensure outcomes meet legislative and professional standards.
<b>Team work and working with others</b>	Support, inform and guide customers new to the case management approach building understanding and confidence. Work collaboratively with colleagues to improve customer service, highlight opportunities for empowering customers further and participate in multi departmental project teams.
<b>Enquiries, reports and service requests</b>	Manage customer interactions promptly and effectively, establishing the nature of the enquiry and then taking action or referring to another team where appropriate. Knowing when to consult with or pass cases over. Supporting customer self-serve by observing peaks or trends in interaction types and spotting opportunities to initiate further enabling and self-serve processes. This could involve championing own ideas, participating in multi departmental teams or project teams.
<b>Processing and administration</b>	Able to identify and develop opportunities for improving workflow / process and /or increasing customer self-serve or enabling; working on cases that require problem solving with customers. Access and accurately update all relevant information systems, both customer and back

Specific Tasks	
	office, ensuring that data is updated and maintained through verification, and validation, and in accordance with Data Protection principles.
<b>Strategy and policy</b>	Provide input into corporate strategy, policy and programmes as required (progression & higher level)
<b>Performance</b>	Working towards achieving the KPIs set by the Head of Customer, Case & Parking Services

Qualifications
<p><b>Level 1:</b> Good standard of education with a minimum of 5 GCSEs or equivalent experience</p> <p><b>Level 2-3:</b> Educated to NVQ level 3 / A Level standard or equivalent experience</p> <p><b>Team Leader:</b> Educated to NVQ level 3 / A Level standard or significant experience. Professional business qualification (desirable). Part qualified in a specialist service qualification or working towards this (desirable)</p>

Knowledge, Skills and Experience
<p><b>Level 1:</b></p> <ul style="list-style-type: none"> <li>• Some experience in a customer facing role, excellent inter-personal skills and a proven ability to deal effectively with customers and remain calm in contentious and difficult situations</li> <li>• Proven ability to quickly learn new systems, follow procedures and processes and maintain accurate records</li> <li>• Clear understanding of health and safety procedures</li> </ul> <p><b>Level 2 (in addition to the above):</b></p> <ul style="list-style-type: none"> <li>• Good level of experience in a customer facing role, excellent inter-personal skills and a proven ability to deal effectively with customers and remain calm in contentious and difficult situations</li> <li>• Some experience of training, inducting and mentoring new staff in case management processes</li> <li>• A good understanding of statutory and regulatory requirements and ability to enforce these when required</li> </ul> <p><b>Level 3 (in addition to the above):</b></p> <ul style="list-style-type: none"> <li>• Significant experience in a customer facing role, excellent inter-personal skills and a proven ability to deal effectively with customers and remain calm in contentious and difficult situations</li> <li>• Experienced in training, inducting and mentoring new staff in case management processes</li> <li>• An excellent understanding of statutory and regulatory requirements and ability to enforce these when required</li> </ul>

### Knowledge, Skills and Experience

#### Team Leader (in addition to the above):

- Proven ability to lead a team with experience in all aspects of people management including effectively manage performance, setting targets and dealing with issues as they arise
- Experience in setting, maintaining and monitoring standards of accuracy, diligence and service delivery

### Special Requirements

#### Emergency Planning

This post will be, on occasions, required to take part in the Council's emergency planning training and may be called upon in the case of such an emergency. Where necessary this will include unsociable hours.

#### Election Duties

This post will, on occasion and with reasonable notice, be expected to assist with election duties as required and this will include working unsociable hours.

A separate payment for election duties will be made as determined by the regional Elections Committee.

### Standard Terms

1. To comply with appropriate legislation, service and council policies.
2. All employees have responsibility under the Health and Safety at Work, etc. Act 1974. These responsibilities are laid out in the council's health and safety policy and procedures.
3. To support and be committed to the council's policy on safeguarding and promoting the welfare of vulnerable groups including, young children and adults and expects all staff and volunteers to share this commitment.
4. To support the council's equalities and diversity policies.
5. To operate within the council's IT policies and data protection rules and regulations.
6. To operate within the council's financial regulations.
7. Manage budgets and resources ensuring that they are deployed effectively with robust internal controls and compliance with relevant regulations, policies and guidelines.
8. To participate in internal committees and departmental working parties to ensure continuous improvement as required.
9. Any other reasonable duties as may be required from time to time

### Competency Framework





Central to the delivery of the role are the Council's values and behaviours and all employees are expected to work within the Council's Organisational Culture Framework. These are shared by all employees and applied to everything we do. The points for each competency are shown below:

<b>Guildford behaviours [competencies]:</b> see the framework in the Performance Review Toolkit for a full list behavioural indicators	
<b>Core Competencies - All Workforce</b>	
<b>Embraces Change</b>	Has a positive attitude to change, adapts to meet new challenges and introduces changes to improve organisational performance.
<b>Innovation and creative thinking</b>	Proactively generates and develops innovative ideas, opportunities or improvements in order to meet organisational objectives more efficiently and effectively
<b>Effective communication</b>	Communicates effectively. Uses communication methods and standards, together with well-reasoned arguments to convince and persuade where necessary.
<b>Customer focus</b>	Puts the customer first, builds effective relationships and seeks feedback to address their needs.
<b>Problem solving &amp; decision making</b>	Understands and analyses issues in order to identify the most appropriate solutions. Makes effective decisions based on thorough analysis and the needs of the organisation.
<b>Focus on efficiency</b>	Meets or exceeds the Council's standards by monitoring the quality of own work, team or service delivery. Continually looks for areas of improvement to ensure efficiency, effectiveness, and value for money.
<b>Performance and learning</b>	Demonstrates personal commitment to meet agreed performance standards and objectives. Learns from experience and takes responsibility for identifying and addressing personal development needs.
<b>Team working</b>	Proactively cooperates and interacts with colleagues, internal and external partners across the Council. Encourages others to develop a collaborative approach to share information, knowledge, and ideas.
<b>Builds relationships</b>	Presents a professional image; uses interpersonal skills to form positive and productive working relationships within and beyond the organisation.
<b>Commitment to the organisation</b>	Consistently supports and demonstrates an understanding of and commitment to the Council's vision and values. Acts with integrity and accountability.

All employees are expected to be flexible in undertaking the duties and responsibilities attached to their role and may be asked to perform other duties, which reasonably correspond to the general character of their role and their level of responsibility. All employees are required to be flexible and undertake out of hours work as required. Meetings outside office hours will be routine and advisors will be expected to attend. This job profile will be supplemented and further defined by annual objectives which will be developed in conjunction with the postholder.

This job profile will be subject to regular review and the Council reserves the right to amend or add to the details.

### **Key Policies**

We are an equal opportunities employer and therefore all staff are expected to comply with our equality policies and help create a work environment in which everyone is treated with dignity, respect, courtesy and fairness. You are also expected to fully comply with health and safety policies and procedures in force to help maintain and develop a safe working environment. In pursuing a practice of continuous improvement and seeking to obtain best value in all aspects of the service,



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**Job Profile: Customer Services Advisor**  
**& Customer Services (& Tourism) Team Leader**



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staff will be expected to assist in other such duties as may be allocated for the benefit of the organisation and their own personal development. Staff will be expected to assist if the Council has to deal with the results of a civil emergency.

<b>Signed (Job Holder):</b>		<b>Date:</b>
<b>Signed (Service Lead):</b>		<b>Date:</b>