

Role Profile

Role:	Customer Casework Officer
Directorate:	Customer Engagement
Salary Band:	6 and 7
Post reference:	CCS70
Job Evaluation Date:	02.05.2019
Role statement of purpose:	To ensure the effective management of a diverse and complex complaints caseload in accordance with TfGM's processes and procedures. Ensure compliance with qualitative and quantitative Key Performance Indicators (KPIs) responding to complaints promptly, providing responses that address the complainant's concerns.
Reports to:	Customer Casework Manager

	Key Role Outputs(KROs) <i>these set out what must be achieved for the post holder to be successful in the role</i>	Key Actions <i>These set out how the KROs will be achieved – the activities required.</i>
Key role outputs and key actions required at Level 1		
1.	Customer feedback/complaints are responded to in a professional and timely manner.	<ul style="list-style-type: none"> • Monitor and respond to customer enquiries, comments and complaints via a range of customer communication channels. • Take initial action on queries from members of the public and elected members, including responding on behalf of the Senior Leadership Team and the Mayor as required/directed. • Undertake a thorough investigation of complex customer complaints/feedback and prepare a response to the customer which comprehensively addresses all aspects of their complaint. • Undertake root cause analysis of each complaint/feedback before preparing a response. • Prepare clear, well-structured and thoroughly researched written correspondence. • Ensure response meets agreed Key Performance Indicators (KPIs).

		<ul style="list-style-type: none"> • Ensure all responses are in line with TfGM's strategic objectives and where necessary escalate draft correspondence for sign-off in line with agreed processes.
2.	Enhanced and maintained knowledge base and relationship/s with key departments and stakeholders.	<ul style="list-style-type: none"> • Build and maintain effective, collaborative relationships with departments across the organisation and develop knowledge in specialist areas through regular meetings to promote information sharing and to obtain accurate information. • Build and maintain effective, collaborative relationships with external stakeholders (for example, Mayor's Office and KeolisAmey Metrolink) to understand their goals and requirements, promoting information sharing and to obtain accurate information. • Liaise with departments within TfGM as required in order to effectively investigate complaints and reach a fair and appropriate outcome. • Challenge decisions on any investigation and outcomes and provide solutions where necessary and required.
3.	Workload is managed using own initiative to meet agreed performance targets.	<ul style="list-style-type: none"> • Manage and progress casework volumes in line with KPIs. • Prioritise casework to manage fluctuating volumes in line with agreed performance targets. • Ensure that all information is requested and retrieved in a timely manner to allow action dates to be met. • Ensure the customer is updated throughout the process in order to manage expectations. • Ensure all customer records are up to date and accurate ensuring full audit record is established. • Use own initiative and work as part of a team to organise complex workload and fluctuating volumes. • Ensure key decisions are made to collate and resolve recurring customer feedback, referring to supervisor as appropriate.
4.	Comprehensive political knowledge and awareness achieved.	<ul style="list-style-type: none"> • Work with colleagues in the Corporate Affairs team to actively develop knowledge of emerging national and regional policies that may affect TfGM, GMCA and GM. • Use appropriate sensitivity when responding to

		<p>any customer feedback, for example to maintain necessary confidentiality, compliance with TfGM's customer service standards and to maintain the reputation of TfGM.</p> <ul style="list-style-type: none"> • Have an awareness and understanding of key transport strategy issues affecting Greater Manchester. • Research current transport issues, and wider public policy where appropriate in terms of the latest thinking and best practice, and interpret knowledge to prepare accurate written correspondence. • Monitor media coverage and TfGM's internal communications to develop knowledge of current transport issues and wider public policy.
5.	The reputation and crisis management process is supported.	<ul style="list-style-type: none"> • Work with colleagues in the Corporate Affairs, Customer Information, Contact Centre teams to create and prepare content ahead of any change or incident to improve the customer experience. • Identify any developing (issues such as major congestion/tram breakdown etc) and highlight to appropriate teams to minimise impact and improve the customer experience. • Work in conjunction with TfGM's Dynamic Working principles
6.	Production of customer feedback reports both within the team and across TfGM functions and key stakeholders.	<ul style="list-style-type: none"> • Ensure all fields and actions on the contact management system are kept up-to-date and accurate. This is to include all aspects of the investigation and the results of the root cause analysis. • Use gathered information and key relationships with internal and external stakeholders to understand what people are saying about transport / TfGM / the Mayor and produce reports as required. • Monitor customer feedback on a regular basis and present reports for areas of improvement to Customer Casework Manager. • Identify key themes and trends in respect of customer feedback and present to Customer Casework Manager on a regular basis. • Promote the reporting of and learning from customer feedback.

7.	Communication effectively maintained with customers across a range of communication channels.	<ul style="list-style-type: none"> • Adopt a positive, customer focused attitude in all communication with customers. • Represent TfGM and deliver a positive impression to all customers and stakeholders. • Demonstrate customer friendly communication styles covering email, telephone, letter and all other contact channels, in both appropriate content and tone. • Adapt communication style/s in order to assist customers in line with their needs. • Challenge practices, processes or behaviours which are not customer focused and continuously consider opportunities for improvements which will positively impact TfGM's customer and stakeholder experience. • Review and share ways of improving TfGM's use of managing casework to Casework Manager and implement changes where appropriate.
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Key role outputs and key actions required at Level 2

1.	Improve the customer case management process to meet customer needs and expectations	<ul style="list-style-type: none"> • Challenge practices, processes or behaviours which are not customer focused and continuously consider opportunities for improvements which will positively impact TfGM's customer and stakeholders' experience. • Support the development of technologies to improve the way customer contact is handled by actively attending any associated meetings/workshops. • Ensure that team procedures are clearly defined, communicated and updated regularly. • Ensure the customer service knowledge base is kept updated with any changes to procedures, working practices and any other relevant information.
2.	Customer casework/feedback at the centre of excellence	<ul style="list-style-type: none"> • Ensure that the customer experience is placed at the heart of all decision making. • Provide guidance, support and coaching to all staff at all levels throughout the organisation on customer casework/feedback. • Research emerging trends and industry best practice and produce good practice and standards documentation. • In one to one meetings, influence Heads of

		<p>Service and Functional Managers to adopt good practice and standards.</p> <ul style="list-style-type: none"> • Support the Customer Casework Manager during absence from the office by approving casework responses and championing the customer strategic priorities.
3.	Management Information Requirements achieved	<ul style="list-style-type: none"> • Support the Customer Casework Manager in the production and maintenance of management information relating to Customer Casework KPI's ensuring the continuing requirements of TfGM can be met. • Assist the Customer Casework Manager in drafting and co-ordinating briefings, reports, and other supporting materials as appropriate to embed specialist knowledge within the Customer team. • Maintain master archive file of data for audit /production reconciliation purposes. • Ensure quality audit checks are in place to support service level agreements and performance.
<p>Compulsory Outputs (COs) <i>these set out what must be achieved for the post holder to be successful in the role</i></p>		<p>Key Actions <i>These set out how the COs will be achieved – the activities required.</i></p>
C1	Ensure you comply with all applicable organisational legislation and policy:	<ul style="list-style-type: none"> • TfGM Safety Management System (in particular section SMS 201 Roles and Responsibilities) • Bus Operator contractual management • Dignity at Work policy; • Information assurance and security in line with Cabinet Office requirements; • Risk management; • TfGM policies and procedures; • Equality and diversity legislation; • TfGM Vision & Values; and • Act in accordance with TfGM's behaviours and competencies.
C2	Any other reasonable duties as required from time to time	

Key Interdependencies

Key Contacts	Customer Casework Manager Customer Casework Officers Customer Engagement Managers in other departments Internal colleagues, and customer relations teams within service provider organisations Corporate Affairs
Direct reports	N/A
Budgetary responsibility	N/A
Location	TfGM, 2 Piccadilly Place, Piccadilly, Manchester M1 3BG

Office Use Only	Updated	Updated	Updated	Updated	Updated
Created					
Kamrun Nehar April 2019					
HR Verification					
Cathryn McGarvey May 2019					

Person Specification

Customer Casework Officer <i>(Knowledge, skills and experience required at selection stage)</i>	
E	Essential Experience:
Essential experience at Level 1	
E1	Experience of handling customer complaints in line with organisational procedures and timescales.
E2	Experience of dealing with complaints involving external stakeholders, such as regulators, elected officials, senior executives.
E3	Excellent written and verbal communication skills with an ability to tailor messages to different audiences in an effective manner, as required.
E4	Experience of writing letters to a high standard paying particular high attention to detail.
E5	Manage fluctuating workloads whilst meeting performance targets.
E6	Demonstrable commitment to providing a top class customer experience with a high level of experience in dealing with the public through verbal and written interaction.
E7	Experience in the use of Microsoft Office software.
E8	Proven track record of succeeding in a target driven environment.
Essential experience at Level 2	
E9	Extensive experience of handling complex complaints in line with organisational timescales.
E10	Demonstrate aptitude in researching, interpreting and analysing complex information to present advice in a clear and concise manner.
E11	Experience of influencing senior stakeholders and implementing improvements.
D	Desirable experience:
D1	Experience of working with contact management systems.
D2	Experience of successfully working with senior management and elected members.
D3	An understanding of key transport strategy issues affecting Greater Manchester.
EQ	Essential Qualifications – Technical, Vocational or educational:
EQ1	Educated to A level standard or equivalent. (e.g. NVQ/equivalent international qualifications)
DQ	Desirable Qualifications – Technical, Vocational or educational:
DQ1	Educated to Degree standard or equivalent.
EA	Essential Attributes:
EA1	Able to demonstrate a passion for customer service.
EA2	Takes personal responsibility for resolving issues and actions arising, or for passing to appropriate person.
EA3	Ability to work effectively as part of a team, contributing to team objectives and supporting colleagues to deliver an effective service.
EA4	Proactive and solutions focused, highlights issues and suggests solutions.
EA5	Excellent time management, planning and organisational skills.
EA6	Ability to excel under pressure and when working to frequent tight deadlines.