

Customer Relationship Consultant

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Scope

This position description applies to the Customer Relationship Consultant.

Definitions

Not Applicable.

Policy

Role Description

The Customer Relationship Consultant is responsible for managing all respite and permanent leads from prospective residents and family members, managing all prospective leads in our CRM database and conducting prospective residents with tours of our aged care homes. The Customer Relationship Consultant must also build and maintain relationships with key organisations that can assist in directing prospective permanent and respite residents to our aged care homes. Success in the role will be determined by the increase and maintenance of high occupancy levels, the ability to successfully convert leads into RAD sales and the development and implementation of marketing initiatives designed to generate sales leads.

Reporting Relationship

On a day to day basis, this position shall report to the Property and Sales Manager.

Indirect reports shall include other executive management representatives.

Qualifications & Experience

Essential:

- Demonstrated successful sales and marketing experience/skills.
- Demonstrated ability in the application of advanced administrative procedures.
- Ability to understand basic analysis techniques.
- Advanced word processing operation skills.
- Ability to work as an effective member of a team.
- Good verbal and written communication skills and the ability to empathise with prospective residents and family members.
- Demonstrated understanding of continuous quality improvement principles.
- Demonstrated ability to undertake work of a confidential nature.
- Ability to work in a timely manner and often at a rapid pace.
- A current drivers licence without restriction.
- Current National Police Certificate (or ability to acquire).

Key Duties and Responsibilities - Sales

- Implementing sales plan initiatives.
- Complying with the agreed customer sales method and admission sales process to achieve a great client experience.
- Travel to locations suitable to the client for sales meetings and presentations for prospective resident.
- Meeting financial targets including occupancy, RAD, additional services and supporting ACFI achievement.
- Managing channel relationships to ensure Respect obtains more than its fair share of leads.
- Maintain facility competitive profiles.
- Intercept and manage all inbound respite and permanent leads from prospective residents and family members including providing prospective residents with tours of our facilities.
- Ensure and monitor, that all prospects/leads are effectively communicated and responded to in a timely manner.
- Record and manage all prospective leads on our CRM database.
- Maintain an advanced understanding of resident fees and charges, applicable RAD and DAP Levels and be able to convey to prospective residents.
- Ensure that prospective leads are given the necessary information package and that the information within the package is both current and explained clearly in a professional manner.
- Ensure the highest standard of professional self-presentation is maintained to project a positive image at all times of Respect.
- Willingness to meet with prospective clients /representatives out of normal business hours if required.

Key Duties and Responsibilities - Resident Administration

- Initial data entry of client details into the CRM database for ease of tracking and reporting.
- Prepare and supply all residential permanent agreements/documentation to clients prior to the admission date.

Key Duties and Responsibilities - Other

- Contribute to continuous quality improvement activities.
- Maintain confidentiality of information.
- Any other task not defined but within the employee's skills, as directed by Respect.

Performance Outcomes

- Sales plan implementation compliance.
- Sales method and admissions sales process compliance as determined by Respect: client satisfaction, enquiry to admission conversion.
- Achieving yearly Budgets as determined by Respect: Occupancy %, RAD / DAP targets, number of contracts written.
- Channel leads quantity improvements.
- Timely and accurate management of the Respect CRM database.

Selection Criteria

1. Previously demonstrated background in sales with the ability to demonstrate successful sales skills and techniques.
2. Effective leadership and management skills.
3. Excellent interpersonal, communication (verbal and written) and relationship management skills.
4. Ability to deal effectively with all levels of clients, lead providers and employees.
5. A supportive, flexible and consultative approach with an ability to relate to the elderly.
6. Advanced word processing operation skills are essential.

Mission, Vision and Values

It is a condition of employment that each employee will, at all times, uphold our organisation's mission, vision and values:

- **Mission:** To care for the elderly in our communities in an environment of respect, value and belonging.
- **Vision:** A world where the elderly feel respected, valued and enjoy a quality of life.
- **Values: Respect:** Treat all people with fairness and dignity. **Care:** Look after and protect the elderly, and each other. **Teamwork:** Encourage, cooperate and build trust. **Courage:** Do the right thing, even when it's difficult. **Integrity:** Be open, honest and trustworthy. **Innovation:** Think differently to solve problems. **Excellence:** Drive quality to continuously improve.

Professional Conduct

- Unless directed otherwise, perform the duties of the position according to the organisation's policies and procedures, as varied from time to time.
- Comply with all reasonable and lawful requests or directions given by the organisation.
- Promote the organisation's values, reputation and integrity.
- Ensure a high standard of personal appearance and conduct: that is, clean, neat, tidy, punctual, and respectful language and manner toward residents, visitors and other employees.
- At NO TIME must information related to a resident, family or other employee be discussed with anyone other than the relevant individual or professional providing care.
- Ensure a flexible and enthusiastic attitude toward undertaking a variety of tasks, and demonstrated commitment to ongoing quality, with a team approach is expected.

- Report all incidences of suspected or actual abuse of residents and participate fully in the investigation of such incidences. This includes but is not limited to physical, sexual, financial, verbal or emotional abuse.
- Nursing employees must, at all times, adhere to the Australian Health Practitioner Regulation Agency's codes and guidelines for nurses.

Workplace Health & Safety

- Perform the duties of the position according to applicable workplace health and safety legislation and regulations by complying with the organisation's policies and procedures.
- Participate in the identification, risk management and infection control programs and contribute to a clean, safe and healthy work environment to ensure the safety of residents, visitors, other employees and self.
- Report immediately, any equipment or situation which is hazardous, or has the potential to be a safety issue.
- Participate in problem solving processes to resolve workplace health and safety and infection control issues.

Quality Improvement

- Provide competent care in accordance with the organisation's policies and procedures, and legislative requirements relevant to the role.
- Complete an Improvement Form when there is an identified need to improve.
- Actively participate and contribute to quality activities which promote quality improvement to care provided, such as, follow up of Improvement Forms, attendance at staff meetings, ongoing education, internal assessments, review of procedures, and evaluation of new products and equipment.

Ongoing Education & Development

- Attend annual mandatory training as required by the organisation, including but not limited to, manual handling, emergency procedures, and infection control.
- Participate in non-mandatory training as provided from time to time at the facility or via the Aged Care Channel online.
- Regularly read work emails and staff notice boards at the facility to remain up-to-date with the organisation's communication including staff memos.
- Membership of relevant professional groups and or associations is recommended.
- The organisation is committed to a program of on-going performance appraisals for each employee. Each employee is required to undertake performance appraisals as required by the organisation.
- Work toward annual training objectives following annual appraisal to ensure skills and knowledge remain up-to-date to fulfill the role.

References/Resources

Not Applicable.