

<b>Job title: Head of Customer Experience</b>	
<b>Reports to: Health &amp; Wellbeing Director</b>	<b>Reporting to job holder: Digital Engagement Manager Communications, Content &amp; Impact Manager</b>
<b>Overall purpose:</b> The Head of Customer Experience is responsible for leading and managing Ben's Customer Experience department. The role is focused on Ben's Health & Wellbeing customers (service users, supporter, partners, etc) owning end-to-end customer journeys alongside all physical, digital, print, and social media touchpoints. This role is also responsible for continuously reviewing and improving all aspects of customer satisfaction and user experience across Ben's wider Health & Wellbeing services. The Head of Customer Experience will oversee Ben's brand and marketing campaigns to promote brand awareness and engagement with individuals (who work in, or who have worked in the automotive industry), automotive partners and stakeholders as well as manage the core functions that sit under the Customer Experience department, namely Digital Engagement and Data, Insights, and Impact. The Head of Customer Experience also forms part of Ben's Health & Wellbeing Senior Management Team working both operationally and strategically to meet organisation aims and objectives	
<b>Principal accountabilities:</b>  <b><u>Planning and organising</u></b> <ul style="list-style-type: none"><li>• Lead, manage and inspire the Customer Experience department and functions</li><li>• Work closely with the Digital Engagement Manager to develop and drive Ben's digital marketing strategy to increase awareness and engagement</li><li>• Work closely with the Communications, Content &amp; Impact Manager to develop and deliver Ben's external communications plan</li><li>• Plan launches of new services and products working with relevant Health &amp; Wellbeing departments and functions (as applicable)</li><li>• Oversee Ben's PR activity for all Health &amp; Wellbeing departments and functions, seeking and maximising PR opportunities in terms of awareness, reach and demonstrating impact</li></ul> <b><u>Business focus</u></b> <ul style="list-style-type: none"><li>• Owns the end-to-end customer journey alongside all physical, digital, print, and social media touchpoints</li><li>• Be accountable for the development and delivery of Ben's Customer Experience department and functions to support consistent, high quality, evidence-based customer focused, and industry relevant services and products are being provided supporting their end-to-end life cycle management</li><li>• To develop and deliver a customer experience strategy (and delivery plan) across Health &amp; Wellbeing services, using data and insights to enable informed decision making</li><li>• To develop an integrated / cross department data dashboard to support real time performance reporting for Health &amp; Wellbeing services</li><li>• Evaluate the success and key learning from all customer experience activity to maximise its impact year on year</li></ul>	

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- Ensure annual operational plans focus on core business objectives and priorities
- Shape and influence future priorities for customer experience department and functions
- Develop and build business cases (as applicable / required) to support the customer experience departments' aims and objectives
- Contribute to the development of Ben's overarching strategic plans and ensures customer experience business plan supports organisation priorities and demonstrates responsibility for effective implementation
- Uses feedback and insights to help shape and influence the future of Ben's Health & Wellbeing services
- Ensure all marketing and communication activities grow Ben's brand, reputation, and reach
- Play an active role in defining and packaging products and services, developing appropriate value propositions which is reflected in all communications and collateral
- Ensure appropriate content and marketing materials are in place and reviewed regularly including collateral, fact sheets, information packs, website content and other digital content (i.e. video, audio, animations, etc)
- Monitor and report regularly on progress against plans, including financial and customer experience activities
- Uses management information and data (including feedback, audit, and evaluations) to support and inform service improvement, development, and demonstration of impact
- Use related systems (i.e. CRM) and platforms (i.e. Email) ensuring the department complies with relevant internal processes and legislation requirements related to confidentiality and GDPR
- Oversee and manage any SARs relevant to Customer Experience function and / or supports the SAR process as required for other requests (as applicable)
- To provide relevant reporting related to compliments, comments and complaints for the Customer Experience function ensuring that any continuous improvement requirements are implemented as applicable
- Manage complaints in accordance with Health & Wellbeing Services policy and procedures
- Produce and review risk assessment and business continuity plans for Customer Experience function on an annual basis (and as required considering any incidents or issues raising concerns)
- Stay on top of marketing intelligence and deliver market research as appropriate including the delivery of Ben's annual surveys (individuals and employer) as well as annual brand tracking
- Analyse and evaluate internal data to help inform marketing strategies and better understand opportunities to enhance customer experience / product / service development
- Support the promotion of fundraising and commercial products and services including campaigns and initiatives, working in close collaboration with the Partnerships, Engagement & Income department
- Support the Health & Wellbeing Director(s) with the development and delivery of awareness and engagement strategies and plans for both support and income generation

#### **Communication**

- Maintain clear communications channels with internal teams, ensuring that data and feedback is shared and acted upon in a timely manner
- Communicate and engage with the Customer Experience team to ensure they are fully informed about matters which affect their day-to-day work and practice and develop their knowledge and understanding of Ben as an organisation

#### **Budgetary control**

- Accountable for income and expenditure for Customer Experience (nee HWB Marketing) cost centre
- To regularly monitor allocated budgets and effectively manage the financial resources ensuring the Customer Experience department operates within agreed financial limits
- Propose annual income and expenditure budgets, shaping and supporting business planning and budgeting process for Customer Experience department
- Support and / or lead on the development of future business cases for investment as required
- Work with finance team to identify process for determining ROI for marketing spend

**Managing performance**

- Take overall responsibility for the Customer Experience team's performance and behaviours, setting appropriate KPI's
- Be responsible for the recruitment, induction, development, and performance of the Customer Experience department and functions ensuring each role that sits underneath the department have clear roles and responsibilities as well as performance objectives
- Provide the direct line management for Digital Engagement Manager and Data, Insights & Impact Manager
- Develop and motivate the Customer Experience team to innovate, achieve high performance and strive to exceed their targets
- Promote positive employee engagement, performance and productivity across Customer Experience department and supports the delivery of Ben's people focus across the wider health and wellbeing teams

**Stakeholder relationships**

- Work in collaboration across the whole of Health & Wellbeing, developing strong working relationships with all Heads of Service
- Work with both internal and external stakeholders to maximise networks, relationships, and opportunities to raise awareness and engagement as well as enhance customer experience
- Manage relationships with outsourced providers / suppliers as applicable to the department
- Play an active role in supporting and managing relationships with external stakeholders
- Represent Ben at employer meetings, automotive industry, and other relevant events (as required)
- Work with Health & Wellbeing Director(s) to put in place written agreements with partners (as appropriate) that set out mutual expectations and requirements

**Achieving customer service excellence**

- Core focus of Customer Experience is to strive for customer excellence in all areas of HWB service delivery

**Additional duties**

- Agree personal and performance KPI's and objectives with active participation in Ben's annual appraisal process (including attending 12 month and 6 months review meetings)
- Participate in monthly review and quarterly performance review meetings and provide a summary of areas discussed and actions within a week of the meeting taking place
- Agree work priorities as applicable during monthly and quarterly review meetings
- Produce management information on a monthly and quarterly basis to support Executive and Board meetings as required
- Ensure any monthly, quarterly, and annual reports are submitted as required in a timely manner
- Attend team meetings (as required) – this may include travel and / or overnight stays
- Provide support to deliver independent investigation of complaints (external) and employee relations issues (internal) as required
- Contributes to the development and effective implementation of Ben's organisational policies, procedures and operational guidance within the Employer Services & Engagement team ensuring compliance and effective adoption
- Deputises in the absence of other Health & Wellbeing Heads of Service or Directors (as required or applicable)
- Supports and leads on Health and Wellbeing projects (as required)
- There may be times when the Head of Customer Experience will be required to support additional duties and / or projects. This will be discussed with relevant Health & Wellbeing Director(s) and agreed with the Head of Customer Experience.

**This job description is not intended to be an exhaustive list of responsibilities and will be regularly reviewed and amended as necessary after consultation.**

### **Deliverables – Key measures:**

#### **Planning and organising**

- Delivery of core service metrics – \*namely related to digital engagement and brand awareness

#### **Business focus**

- Delivery of core service metrics\*
- Deliver of service SLA's (to be defined)
- Delivery of Ben's policies and procedures following correct process and timelines
- People data – absence, retention, vacancies, employee engagement results
- Maximising ROI for all customer experience activities

#### **Communication**

- Employee engagement results and feedback
- Relationships across SMT and wider HWB & Ben colleagues
- Reporting and monitoring of Customer Experience performance

#### **Budgetary control**

- Customer Experience cost centre – managing expenditure in line with budget

#### **Managing performance**

- 100% appraisal delivery across Customer Experience department
- Delivery of core service metrics\*
- Regular review meetings with Customer Experience direct reports (at least 4-6 weeks)

#### **Stakeholder relationships**

- Feedback from internal and external stakeholders
- Data and insights related to service metrics\*
- Complaints and compliments received

#### **Achieving customer service excellence**

- HWB wide service metrics related to customer service, satisfaction, NPS, etc.
- Feedback from customers
- Complaints and compliments received

#### **Additional duties**

- All deliverables stated above, plus:
- Submitting all reporting performance requirements (as outlined in accountabilities)
- Attendance of at least 90% of SMT / wider HWB meetings
- Project / actions completed as per stated timelines

#### **PRIDE values**

To embody and deliver the role of Head of Outreach in line with our values: -

Passionate

Respectful

Inclusive

Driven

Empowered

Fostering the following PRIDE behaviours:

- Working with people – *demonstrating commitment to developing self and others, showing leadership, working as a team, and taking ownership.*
- Delivering business success – *demonstrating analytical thinking, commercial awareness, customer service excellence, drive for excellence, strategic thinking, business acumen.*
- Personal effectiveness – *demonstrating strong communication, drive for results, willingness to make things happen, motivated to influence, and make an impact, excellent organisation and planning and self-confidence.*

#### **Experience required:**

Leading, managing and collaborating within:

- An inter-disciplinary and / or a multi-disciplinary team
- A team which is geographically spread with a mix of office / on-site and home-based workers

Other

- Mapping and owning customer journeys and touch points
- Track record of hands-on development of high-quality marketing materials and content
- Experienced in the delivery of digital marketing, awareness, and engagement and / or customer experience
- Working with digital marketing platforms, analytical tools, and CRM
- Owning brand awareness, brand guidelines and ensuring communications are on brand
- Responsibility for PR and increasing reach through PR activities
- Using data and insights to measure performance and drive informed decision making
- High quality, customer centred services
- Effective planning and decision making
- Having previously worked for a charity, fundraising and / or commercially driven services
- Services and / or product development
- Preparing reports, communicating complex information clearly and accurately
- Change which delivers service improvement or efficiencies
- Projects and programmes of work
- Annual budgeting and cost control
- Relationships / account management
- Delivery of events / other services
- Resolving complex enquiries or complaints

#### **Technical Knowledge & Skills:**

##### **Knowledge / Qualifications**

- Numerate and literate, with good standard of education, preferably to degree level or equivalent (relevant) qualification
- Level 5 Leadership & Management Qualification (D)
- Excellent working knowledge and application of high-quality customer experience
- Understanding of charity working regulation and standards (D)
- Knowledge of product development process
- Understanding of the automotive industry of its needs and requirements (D)
- Knowledge of the latest trends in fundraising (D)
- Strong communication and ability to influence
- Ability to communicate effectively at all levels across multiple stakeholders
- Excellent interpersonal and relationship-building skills with the ability to network, motivate and inspire individuals at all levels
- Ability to build rapport and collaborative working relationships
- Ability to motivate and manage a customer facing team
- Excellent verbal and written communications skills, with the ability to articulate information in a persuasive manner
- Effective written communication to prepare documents and reports as required
- Excellent organisational and planning skills, including the ability to prioritise and manage own work under pressure
- Project planning and management
- Ability to use effective and ethical judgment
- Effective liaison skills
- Ability to inspire, lead and manage people, teams, and a department
- Effective people skills including line management
- Ability to work calmly under pressure
- Ability to sensitively and professionally
- Ability to prioritise own workload and work under own initiative

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	<ul style="list-style-type: none"> <li>• Proficient in the use of Microsoft 365 including outlook, word, excel and PPP and digital platforms</li> <li>• Ability to develop and streamline processes for efficiency and effectiveness</li> <li>• Ability to manage conflicting priorities and deliver to deadlines</li> <li>• Prioritise own workload and work under own initiative</li> <li>• Excellent presentation skills</li> <li>• Ability to analyse and interpret data</li> <li>• Ability to use own initiative, prioritise and demonstrate problem-solving approach</li> <li>• Able to understand the automotive industry and present BEN's work with authority</li> </ul>
<p><b>Other significant role requirements:</b></p> <p>In addition to the above areas, the Head of Customer Experience should show commitment to:</p> <ul style="list-style-type: none"> <li>• Pursue continuous professional development and maintain professional registration or membership (as applicable) to maintain knowledge, develop self-awareness and enhance professional skills</li> <li>• Demonstrate flexibility and be adaptable, being comfortable with change and conflicting pressures</li> <li>• Be conscientious and motivated to deliver to deadlines</li> <li>• Be creative and take a solution focused approach</li> <li>• Be open and honest and demonstrate integrity</li> <li>• Be caring and have a desire to help and support others</li> <li>• Amiable, displaying an approachable manner</li> <li>• Passionate about the services we deliver, showing excitement and interest</li> <li>• Seeking to enhance and continuously improve self and the services we provide</li> <li>• Ambitious and aspiring, with a strong willingness to succeed</li> <li>• Be focused with the ability to drive projects and task to completion</li> <li>• Positive attitude with a willingness to learn</li> <li>• Show determination and persistence</li> <li>• Ambitious, innovative, self-motivated and target driven</li> <li>• Energetic and enthusiastic with a high level of resilience</li> <li>• Be willing to work occasional evenings and weekends (if necessary)</li> <li>• Be willing to travel within the UK as required</li> </ul> <p>It is also expected that all Ben Employees, will:</p> <ul style="list-style-type: none"> <li>• Act as an ambassador for Ben maintaining the highest standards of presentation and conduct at all times</li> <li>• Comply with all Ben internal policies and procedures including HR, Finance, Health &amp; Safety, Information Governance, and IT</li> <li>• Ensure health, safety and environmental risks are adequately assessed and managed accordingly</li> <li>• Promotes a culture which recognises, respects and values diversity and equality of opportunity for our customers and colleagues</li> </ul>	
<p><b>Date updated: 19<sup>th</sup> April 2022</b></p>	
<p><b>SIGNED BY JOB HOLDER:</b> ..... <b>DATE:</b> .....</p>	