**Job title:** Customer Relations Manager

**Responsible to:**  Home Manager

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**Our Values**

## Fulfilling Lives is our core purpose

## Every one of us makes a difference is the belief that drives us

## Caring, Passionate and Teamwork are the values that underpin everything we do

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## Job Summary

The role of the Customer Relations Manager (CRM) is to drive sales and support the care home to achieve its sales targets, with a primary focus on self-funded customers.

The CRM will work flexibly in order to meet business needs and this will entail working some evenings and weekends to provide an exceptional customer experience for each sales enquiry.

In addition, the CRM will develop strong links with local charities, support agencies, schools, local clubs and other potential interested parties. PR and partnership opportunities will be developed by the CRM to best promote the home locally.

### Key Responsibilities

* Achieve set targets for resident occupancy, associated self-pay mix and average weekly fee.
* Increase awareness and referrals to the care home through relationship development with clinical consultants, legal professionals, care agencies, hospital discharge teams and charity organisations.
* Promote the care home via strong community relationships and drive enquiries through events, sponsorship and PR.
* Ensure all enquiries are dealt with professionally and within 24 hours, adhering to the Care UK standard operating procedures.
* Accurately record all prospect and resident information on the database system. Make note of the initial source of enquiry to establish marketing trends.
* Effectively communicate accurate information to prospective clients regarding the facilities, care expertise, service and prices, complying with CMA guidelines.
* Conduct a thorough needs analysis to all prospective clients on the phone or in person by using a range of questioning techniques.
* Ensure that the self-funding contract is understood and is clearly communicated to all prospective clients
* Ensure prospective clients that do not initially commit to buy are followed up within the set time frame and are continually contacted in line with the SOP’s and database management system requirements.
* Understand and monitor the competitor landscape to ensure the homes maintain their competitive advantage and identify gaps in the local market.
* Identify potential business and marketing opportunities within the local catchment area.
* Complete all necessary paperwork accurately including contract and direct debit mandates.
* Ensure that the reception team are always aware of incoming residents and appointments for tours.
* Liaise with the business administrator for billing/invoicing purposes ensuring no resident is admitted until a contract has been signed and deposit has been paid.
* Work closely with the Home Manager and Clinical Lead to arrange Pre-Admission Assessments and suitable admission dates.
* Work with the home manager (and if necessary, be the primary point of contact) on the day of admission to ensure a seamless process.
* Arrange review meetings with relatives one month after residency and allow smooth handover to Clinical Lead.
* Ensure all daily, weekly and monthly required reports are completed on accurately and on time.

**Safeguarding of Vulnerable Adults / Mental Capacity Act**

To complete training on Safeguarding of Vulnerable Adults and the Mental Capacity Act and be able to understand and implement SVA and MHA policies and procedures taking responsibility for reporting any safeguarding concerns to the senior person on duty or on-call RD.

### Health and Safety

As an employee of Care UK, the post holder has a duty under the Health and Safety at Work Act 1974, to:

* Take reasonable care of the health and safety of themselves and all other persons who may be affected by their acts or omissions at work
* Co-operate with their employer to ensure compliance with Health and Safety legislation and the Health and Safety policies and procedures of the organisation, not intentionally or recklessly interfere with, or misuse, anything provided in the interests of health, safety, or welfare, in pursuance of any of the relevant statutory provisions
* To ensure that adequate measures are taken to protect the health and safety of all staff including the maintenance and upkeep of a safe environment

**Data Protection**

The post holder must at all times respect the confidentiality of information in line with the requirements of the Data Protection Act and the company’s ISO27001 accreditation.  This includes, if required to do so, obtain, process and/or use information held on a computer in a fair and lawful way, to hold data only for the specified registered purposes and to use or disclose data only to authorised persons or organisations as instructed

* This list of duties and responsibilities is by not exhaustive and the post holder may be required to undertake other relevant and appropriate duties as reasonably required
* This job description is subject to regular review and appropriate modification

I confirm I have read and understand this Job Description

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| **Name of postholder** |
| **Signature**  |
| **Date** |

##### Person specification

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| **Criteria** | **Essential** | **Desirable** |
| Qualifications | * GCSEs (or equivalent) including English and Maths

  | * Evidence of further education
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| Experience | * Customer facing environment
* Working in a target driven environment
* Sales experience
 | * Experience already gained in a care home environment
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| **Technical Skills** | * Competent with Microsoft Excel, Word and Powerpoint packages
* Excellent communication skills both written and verbal
* Drawing up contracts
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| **Personal Qualities** | * Self-motivated, flexible and enthusiastic
* Works collaboratively with others sharing ideas and information at all times
* Effectively builds trust with a consistent approach between actions and words
* Keen to learn and improve own performance
* Committed to communicate with customers to understand their needs
* Will go the extra mile to help fulfil customer’s needs
* Has a ‘can-do’ attitude to work
* Enjoys working effectively as part of a team
* Highly organised, ability to keep track and progress multiple priorities at any one time
* A customer service mindset; ensuring customers are given the highest priority and that agreed actions and customer expectations are met
* Ability to work with and influence action through others
* Confident, personable, professional and friendly manner
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