

# Customer Service Assistant



## Kickstart Job pack (May 2021)

Thank you for your interest in working at Citizens Advice Richmond. This job pack should give you everything you need to know to apply for this role and what it means to work for us.

In this pack you'll find:

- Our values
- Three things you should know about us
- Overview of Citizens Advice and Citizens Advice Richmond
- The role profile and personal specification
- Summary terms and conditions



## Citizens Advice values

**We're inventive.** We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

**We're generous.** We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

**We're responsible.** We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.



## 3 things you should know about the Citizens Advice service

**1. We're local and we're national.** There are six national offices that offer direct support to people in 280 independent local Citizens Advice services across England and Wales.

**2. We're here for everyone.** Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

**3. We're listened to - and we make a difference.** Our trusted brand and the quality of our

research mean we make a real impact on behalf of the people who rely on us.

## Overview of the Citizens Advice service

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of 280 local Citizens Advice members.

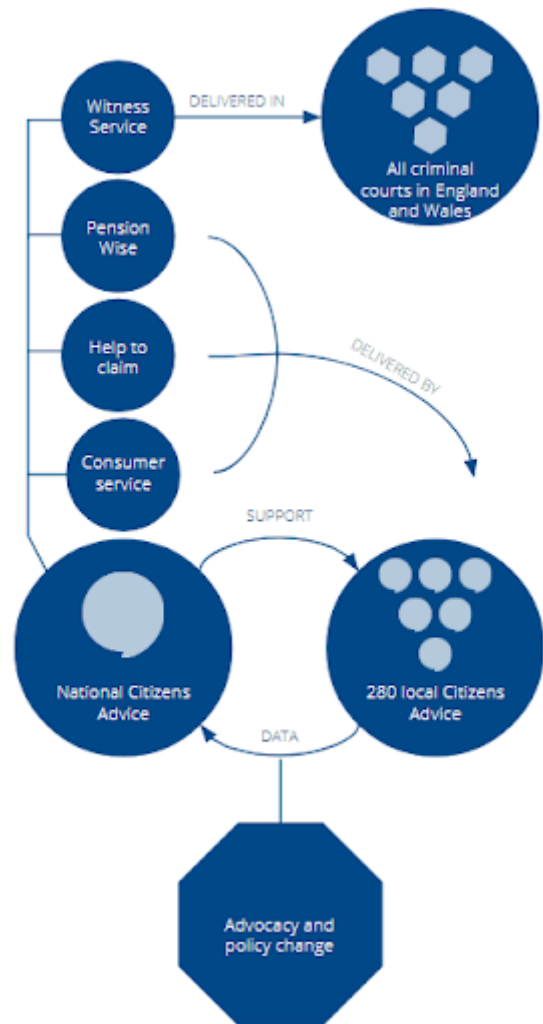
This role sits within our network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.



## About Citizens Advice Richmond

Citizens Advice Richmond is an independent local charity providing information and advice to anyone who lives, works or studies in Richmond borough. Our service is free, confidential and impartial. We aim to empower people to resolve their problems and change their lives for the better.

We offer information and generalist advice on any issue and specialist debt advice through Capitalise, the London debt advice partnership. We also offer specialist legal and financial advice delivered by professionals acting on a pro bono basis.

At the moment, all our services are only available by phone, email and by referral from other organisations. Prior to the Covid-19 pandemic, we maintained four main offices and four outreach venues across the borough.

We have 17 paid staff, though we use volunteers to deliver most of our advice services and for a variety of support roles.

As well as giving advice we aim to prevent the problems that affect people's lives:

- Influence – we collect evidence of practices and policies that cause the issues we help with; our knowledge of clients' problems and circumstances enable us to campaign for change to get a fairer deal for everyone
- Money education – we offer courses, workshops and one-to-one help to empower people to avoid debt and increase confidence about personal finances, working with local organisations, schools and community centres.

The Covid-19 pandemic has caused an increase in demand for our services and we are now helping more people, deal with more advice issues, than ever before.



## The role

### Role purpose

The Customer Service Assistant (CSA) is often the first person that a client will encounter when accessing the Citizens Advice service. The CSA carries out an exploration of a client's enquiry and gathers relevant background information. They will research the necessary sources, make referrals to internal advisers and external partner organisations and identify the next steps the client needs to take to resolve their issue. The CSA will record client details and information or advice given on our Casebook system. Any research and campaigns issues will be highlighted and referred to the Research and Campaigns team.



## Role profile

### Assessing clients' needs

- Identify key information about the client's problem including time limits, key dates and requirements for urgent advice or action.
- Assess and agree the appropriate level of service, taking into consideration the clients' ability to take the next step themselves, the complexity of the problem and the available resources.
- Refer clients appropriately (both internally and externally) to suit clients' needs following agreed protocols, including making arrangements and informing clients of what to expect.
- Record information given during gateway assessment interviews onto the client recording system-Casebook.
- Assess client's problem(s) using sensitive listening and questioning skills, signpost clients appropriately to suit their needs, following agreed protocols.

### Discrimination

- Identify if there is any question of discrimination in the issue the client presents.
- Be aware of the organisation's procedures for dealing with actual and potential discrimination issues.

### Research and campaigns

- Identify research and campaigns issues.
- Assist with research and campaigns work by providing information about clients' circumstances through the appropriate channel.

### Professional development

- Keep up to date with legislation, policies and procedures and undertake appropriate training for gateway assessment.
- Prepare for and attend supervision sessions / team / staff meetings / external meetings as appropriate.

## Administration

- Use IT for record keeping and online communication.
- Ensure all work conforms to the organisation's systems and procedures.



## Person specification

### Essential Criteria

1. Understanding of the issues affecting society and their implications for our clients.
2. GCSE pass (grade 4 or C and above) in English and Maths.
3. Ability to give and receive feedback objectively and sensitively and willingness to challenge constructively.
4. Ability to write clearly and accurately.
5. Ability to communicate effectively and sensitively face to face, electronically and over the phone.
6. Ability to prioritise tasks and organise your time.
7. IT competent in use of emails/Office Documents/inputting data/navigating online information systems.
8. Commitment to continuing professional development, including a willingness to learn and develop knowledge and skills in main enquiry areas.



## Summary terms and conditions

Location: Richmond (SW London); the post will be based at our Hampton Hill office, though there will be some home working and you may be required to occasionally visit and work at our other offices in Richmond borough, when these re-open.

Salary: NMW, plus 3% employer pension contribution

Hours: 25 per week (flexible days)

Contract: fixed term for 6 months

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*Citizens Advice Richmond is the operating name of Richmond Citizens Advice Bureaux Service. Charity registration number: 1085878; a company limited by guarantee, registered in England and Wales, registered number: 04140012. Registered office: 94-102 High Street, Hampton Hill, Hampton TW12 1NY.*