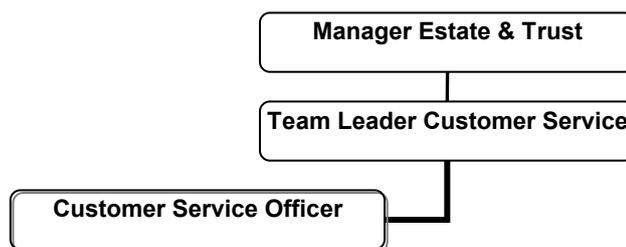


JOB DESCRIPTION

Job Title: Department: Group / Team: Responsible To: Responsible For: (Total number of staff) Job Purpose: Date:	Customer Service Officer – CSO (New) Operations Customer Service Manager Estate & Trust/ Team Leader Customer Service Officer is responsible for providing a broad range of support in the provision of advice and the high-quality ongoing service to prospective, new, and existing customers. The CS Officer plays a key role in contributing to and enhancing the overall customer experience. <ul style="list-style-type: none"> Maintaining a customer case load, including file management and the preparation of internal and external documentation in accordance with the FPTCL Act, regulations, and Corporations standard operating procedures. Provide expert and technical advice only to a wide range of clients on Estates, Trusts, Legal, Wills, and other services provided by the Corporation. Communicating clearly, regularly, and proactively to deliver on customer enquiries within agreed time frames. The ability to participate in the implementation of change processes and practices to improve the quality of the customer experience. Handling complaints, providing appropriate solutions and alternatives.
	June 2022

Organisation Context



Key Relationships

External <ul style="list-style-type: none"> Beneficiaries Government statutory Bodies Financial Institutions. 	Purpose of contact with this person/s <ul style="list-style-type: none"> Customers Obtaining approvals, transfers and administration of estates and trusts Personal Assets
Internal <ul style="list-style-type: none"> FPTCL Management & Staff 	<ul style="list-style-type: none"> Carry out customer service for Estates, Trusts administration, legal and Will tasks and provide reports accordingly.

Key Result Areas / Key Achievement Areas

The position of **Customer Service Officer** encompasses the following major functions or Key Result Areas.

Jobholder is responsible for	Jobholder is successful when
Is Accountable for	And is Successful when
Customer Service Relationship & Interaction	
<ul style="list-style-type: none"> Handle client queries via calls, emails, chat online, face to face and update the clients on the status of the Trust, Estate, Legal and Will services respectively. Collect, check, and verify that all information on the application is correct and completed. Carry out thorough interview, investigation, and detail examination of the potential beneficiaries and to gain full understanding of the estate and trust case. Handling and register customer complaints, providing appropriate solutions and alternatives as per the Customer Service Policy. 	<ul style="list-style-type: none"> Successful in attending to client queries with favourable results within the time frame highlighted in the Customer Service Policy and the SOP. All application information received are completed and it is accurate and with zero errors. Customer complaints to be resolved within the time frame as per Customer Service Policy. Adhering to Professional Customer Service Standards at all times.
Customer Relation Management System (CRMS)	
<ul style="list-style-type: none"> Record and update client information in the CRMS Schedule deadlines for every task and make appointments accordingly. Keep track and ensure that all tasks are carried out effectively and efficiently. Provide a weekly report update on the customer service status to Team Leader Customer Service. 	<ul style="list-style-type: none"> All client information is accurately recorded. Task deadlines are met, and appointments are carried out effectively and efficiently Customer service report updates are submitted every week with zero errors.
Operating System	
<ul style="list-style-type: none"> Initiate tasks and assign to the operation team for the respective services (Estate/Trust/Legal/Wills) Follow up on the status (Estate/Trust/Legal/Wills) and send a formal reminder email to clients accordingly as per standard operating procedure. Contribute to system user improvements. 	<ul style="list-style-type: none"> Tasks are initiated and assigned via FileHold on a timely manner 100% compliance to FileHold processes and procedures (As per the SOP). Identify areas of improvement.
Document Management System	
<ul style="list-style-type: none"> Digitise, record, and document all CS related documents via FileHold and CRMS. 	<ul style="list-style-type: none"> All related CS documents are digitised on a timely manner with zero errors.
Marketing and Awareness	
<ul style="list-style-type: none"> Attend with the team for presentation and public awareness programmes as per the Corporations Marketing plan. 	<ul style="list-style-type: none"> Achieve 50% prospective customers Increase new client by 2% Excellent presentation feedback assessment.
Other tasks assigned by the management team as and when requires.	

Key Behaviors / Competencies

- Persuasive speaking skills
- Empathy
- Adaptability
- Ability to use positive language
- Clear communication skill
- Self-control
- Taking responsibility
- Patience
- Effective listening
- Positive attitude and team player

Or Core Competencies

- Customer Service – Professional customer service and result driven
- Personal Attributes – High level of initiative and confidentiality
- Communication – Excellent written and verbal Skills
- Technology – Good working knowledge using systems such Customer Relations Management (CRMS) and FileHold System

Person Specification

This section is designed to capture the expertise required for the role at the 100% fully effective level (this does not necessarily reflect what the current jobholder has). This may be a combination of knowledge / experience, qualifications, or equivalent level of learning through experience or key skills, attributes, or job specific competencies.

Qualifications (or equivalent level of learning)

Essential	Desirable
<ul style="list-style-type: none">▪ Relevant Diploma qualification either in commerce, administration or Legal▪ Customer Service Certificates	<ul style="list-style-type: none">▪ Relevant Degree qualification either in commerce, legal or administration

Knowledge / Experience

Essential <i>(Indicate years of experience required as appropriate)</i>	Desirable
<ul style="list-style-type: none">▪ At least 1 year of experience as a customer service officer/ estate & trust officer/ or similar role.	<ul style="list-style-type: none">▪ 2 years of experience as a customer service officer/ estate & trust officer/ or similar role.

Key Skills / Attributes / Job Specific Competencies

The following levels would typically be expected for the 100% fully effective level:

Expert level	Professional Customer service orientation – Estate, Trust, Legal and Will services
Advanced level	Administration tasks
Working Knowledge	Customer Service – Estate, Trust, Legal, Wills The use of technology - Customer Relations Management System (CRMS) and FileHold (FH)
Awareness	Knowledge and understanding of all functions of the Fiji Public Trustee Corporation Pte Limited, Fiji Public Trustee Act and related legislations.

Change to job description

From time to time it may be necessary to consider changes in the job description in response to the changing nature of our work environment– including technological requirements or statutory changes. This Job Description may be reviewed as part of the preparation for performance planning for the annual performance cycle or as required.

Name:
Customer Service Officer

Date

Name:
Manager Estate & Trust

Date

Approved: Name:
 Chief Executive Officer

Date

OTHER OPTIONS FOR JOB DESCRIPTIONS USED FOR JOB EVALUATION

Work Complexity

Most challenging duties typically undertaken, or most complex problems solved:

- Handle and respond to aggressive customer/clients
- Convert prospective customers to be FPTCL clients
- The ability incorporates changes in systems, processes, and best practices.

Freedom To Act

Guidelines available to assist job holder to make decisions e.g., policy documents, standard procedures.

- Human Resource Manual
- FPTCL Financial Manual
- Customer Service Policy
- Master Collective agreement (MCA)

Financial Responsibilities

Controls a budget Y/N

Maximum that may be spent without reference to manager _____

Jobholder can spend unbudgeted capital Y/N. Amount _____

Jobholder is responsible for committing the organisation to long-term contracts Y/N

Jobholder signs correspondence for Company Y/N