

## Help to Claim Telephone and Webchat Adviser – Person Specification – June 2021

No.	Job description point	Skills & qualities	Knowledge	Experience
<b>Universal Support Project</b>				
1.1	Deliver telephone and webchat service as outlined in the service model devised by national Citizens Advice.		Basic knowledge of financial literacy, money advice or similar discipline. Benefits knowledge – legacy benefits and Universal Credit	Must be a trained advisor with recent experience of giving advice (preferably but not exclusively in a Citizens Advice context).
1.2	Complete required monitoring for Citizens Advice against project KPIs	Ability to undertake accurate data and information recording.	Understanding of how service monitoring systems collect data and information	Experience of using case-recording or database systems (D)
<b>Marketing and relationship building</b>				
2.2	Build and maintain good working relationships with staff and volunteers of other agencies that we work with			Experience of working with people from a range of backgrounds
2.4	Help develop literature to promote the project and carry out other marketing activities	Ability to write interesting and engaging material.	Knowledge of marketing projects in the VCSE (D)	
<b>Professional development</b>				
4.1	Identify and implement plans for own training and development needs.	Commitment to keeping own skills current and improving practice.		
4.2	Keep up to date with relevant topics, available training materials and other resources.			
<b>Research &amp; Campaigns</b>				
4.1	Assist with research and campaigns work by providing information about clients' circumstances.		A basic understanding of the way in which R&C supports the aims and principles of the service.	
4.2	Provide statistical information on the number of clients and nature of cases and provide reports			Experience of using CA system Casebook (D)
5.3	Deliver service provision to ensure that it reaches the widest possible client group.			Experience of helping to implement an equalities

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				and diversity action plan (D)
<b>Other duties and responsibilities</b>				
5.1	Uphold the aims and principles of the CAB service and its equal opportunities policies.	Demonstrable personal commitment to upholding and promoting the aims, principles and policies of the Citizens Advice service.	An excellent understanding of the aims, principles and policies of the Citizens Advice service.	Experience of managing confidentiality (preferably in a Citizens Advice context).
		Have the ability to challenge discrimination.	Have a good appreciation of equality and diversity policies and procedure in a Citizens Advice context.	Demonstrable experience of working within equality principles.
5.2	Maintain effective and efficient administration systems for the delivery of the project.	Excellent administrative and organisational skills		
5.3	Use IT for statistical recording, record keeping and document production.			Experience of using the Microsoft office suite.
5.7	Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.		A good knowledge of safeguarding and health & safety procedures.	

KEY: (D) means desirable but not mandatory