BC PENSION CORPORATION

JOB DESCRIPTION

JOB DETAILS

Job Title:	Client Service Representative	**Job ID:**	CK1407
Classification:	Clerk R14	**Classification Date: (MM/DD/YYYY)**	
Branch:	Member Services	**Unit:**	MEX-Member Services
Reports to:	Client Service Manager	**Security Screening:**	Yes
Union/Excluded:	BCGEU		

BRANCH DESCRIPTION

Member Services is comprised of two teams, Member Support Services (MSS) and the Member Services Centre (MSC) who act as the first point of contact for the corporation for members and stakeholders through a multi-channel service delivery model. The Member Services team provides an integrated, consistent and personalized service experience in all interactions with a digital first approach to serving members. Interaction channels include telephone, written correspondence, secure messaging, web chat, co-browse, fax, scheduled appointments and member workshops.

Member Support Services plays an integral role in the member experience as the team responsible for the intake, distribution and imaging of written correspondence and delivering corporate wide front-line services at Reception. The Record Assistant team is accountable for the triage of online, paper and electronic member requests providing case management initiation services for the MSC and Plan Operations branch to support timely pension payments and responses to member and key stakeholders (ie. employers, financial institutions, other pension organizations and beneficiaries). The Client Education Program (CEP) is responsible for delivering province wide member education workshops and employer hosted special events that educates and engages members in understanding their pension plan.

A key deliverable in the 12/21 Strategic Plan, the Member Services Centre delivers reliable, responsive and consistent front-line services (e.g. telephone, web chat, co-browse, scheduled appointments) in all member and key stakeholder interactions (ie. employers, financial institutions, other pension organizations and beneficiaries). Staff are highly enabled with ongoing knowledge and training, quality assurance coaching and feedback, and the tools and technology to meet the changing needs and expectations of members in a modernized service environment.

JOB SUMMARY

The Client Service Representatives (CSR) are trained as the first point of contact to respond to all member questions and inquiries across five distinct pension plans which are complex in nature in a multi-channel contact centre environment. Channels include phone, mail, fax, email, chat and in-person appointments.

The CSR gathers information, analyzes data, assesses member needs, counsel’s members and clients and explains pension concepts in order to determine pension and benefit eligibility, retirement planning, retirement applications, leaves of absence, pension plan entitlements and options, as well as marital breakdown and death. Of utmost importance is the requirement to provide members with accurate pension information based on legislation, policy and administrative processes for the distinct pension plans using consistent processes, standards and member-centric language and to ensure a high degree of accuracy when updating plan member accounts with relevant information and documentation.

CSR’s are expected to demonstrate professionalism, exercise composure, compassion and diplomacy when dealing with an upset member, and under sometimes challenging circumstances or periods of high call volumes.

Based on the complexity of the work they are responsible to perform, the CSR requires significant pension administration knowledge and is required to have the skills and ability to think on their feet, use sound judgement and provide timely, accurate and consistent information to deliver a high quality member experience at all times.

Member interactions are monitored by a Quality Assurance Coach and Client Service Managers to evaluate the quality and consistency of service being delivered to members, to provide coaching and soft skill development and to ensure compliance with policy and legislation that may be in effect.

JOB RESPONSIBILITIES

1. Provides a consistent high quality member experience in a multi-channel environment by:

- Assessing member, beneficiary and clients’ needs and determining an appropriate course of action using sound judgment, pension administration expertise with a member centric focus;
- Communicating complex concepts and information on retirement, termination and post-retirement death benefit entitlements, complex pension service purchases and changes to post-retirement group benefits verbally and in writing;
- Explaining pension concepts, plan rules, interest applications and administrative processes to members, clients and their representatives;
- Explaining the nature and timing of member benefit entitlements and termination of entitlements;

- Counselling members regarding the eligibility for and impact of pension plan options, costs and tax implications;
- Responding to correspondence (fax, mail, email) in response to member inquiries using their expertise to interpret and apply legislation, regulations, policies and procedures and plan rules;
- Meeting with plan members, beneficiaries and clients to provide information, counselling and guidance on pension plan options, determine eligibility and review forms;
- Ensuring a high degree of accuracy when updating accounts and providing verbal and written responses to members questions and inquiries;
- Using member-centric language to explain complex pension concepts in plain language;
- Utilizing tools, guides, procedures and processes to deliver consistent high quality service;
- Refers cases of greater complexity to Client Service Specialist;
- Promoting and guiding members to utilize digital information including plan websites and on-line tools such as My Account and Online Retirement;
- Determining and reviewing benefit eligibility based on pension plan rules, case specific data and plan member records;

2. Provides training, guidance and support to new hires and co-workers:

- Reviews and approves the work of others;
- Ensures member records and case files are properly set up on the system;
- Provides training and guidance to other Client Service Representatives and Records Assistants in gathering information and communicating pension administration;
- Provides guidance on responses to member inquiries;

3. Other Duties:

- Provides pension administration support to other branches, as required;
- Participates in projects as a subject matter expert, as required;
- Participates in branch projects and initiatives that transform and improve member service;
- Contributes to meeting client performance measurements by following established standards, objectives and targets;
- Identifies issues and brings them to the attention of the Client Service Manager or Assistant Director;
- Provides recommendations and solutions to known issues in member service, forms, publications, distribution and consistent and/or general member concerns;
- Supports and participates in systems maintenance and enhancements by compiling test case scenarios and testing system modifications;

EDUCATION

Degree/Diploma Obtained	Program of Study

• A high school diploma, or equivalent.
• Successful completion of the Basic Pension Administration Certificate (BPAC), Certified Employee Benefits Specialist (CEBS) program or other recognized certificate/diploma in benefits or pension administration is preferred.

EXPERIENCE

Years of Experience	Type of Experience

• Three years of experience providing information and delivering services to clients/customers in a high volume environment.
• Experience applying and communicating financial calculations to clients.
• Experience navigating multiple computer systems/applications.
• Contact centre experience is preferred.
• Experience applying policies, rules and legislation is preferred.
• Preference may be given to applicants with financial or pension experience.

KNOWLEDGE, SKILLS & ABILITIES

- Ability to provide exceptional and consistent customer service at all times;
- Ability to understand and apply complex concepts, pension administration and knowledge effectively;
- Ability to process a large volume of member interactions across multi-channels on a daily basis;
- Ability to use a member focused approach to analyzing member needs, determining and understanding underlying issues and creating sound solutions;
- Ability to operate a computer with multiple systems and applications to establish, update, and or retrieve member information with a high degree of accuracy;
- Ability to interpret and apply rules and legislation;
- Exceptional verbal and written communication skills are required;
- Ability to translate complex data into plain language appropriate to the level of audience required in an empathetic and professional matter;
- Ability to adapt in an ever-changing and high paced environment.

CORE COMPETENCIES

Navigating Change L1
Supporting self and others through change and transition and enabling successful transformation in work products and processes.

- Suggests improvements in the way things are done in the organization.

- Adopts new ideas and ways of doing things.
- Identifies challenges related to change.
- Remains effective in the face of difficult or demanding situations.

Embracing Learning L2
Contributing to a learning culture by developing self and supporting others to acquire skills and improve performance.

- Gathers feedback from various sources to identify own strengths and weaknesses.
- Pursues challenging experiences beyond current position to add value in own area.
- Helps others identify learning needs to meet current job requirements.
- Provides honest, timely, clear and specific feedback to others.
- Ensures people are provided appropriate training within available budget and resources.
- Encourages people to reach their full potential.

Client Orientation L1
Making it easy for our external and internal clients - seeing things through their eyes.

- Follows established processes to ensure consistent service.
- Responds to client needs in a timely, respectful, helpful, and courteous manner.
- Addresses client issues in order of priority.
- Keeps clients up-to-date on the progress of the service they are receiving.
- Directs clients to alternate service channels that may better meet their service needs.

Accountability L1
Holding self and others accountable to deliver on commitments and to achieve desired results.

- Organizes own work load, clarifying priorities and expectations.
- Participates in monitoring own performance.
- Adjusts actions to meet expectations.
- Takes action on things that need attention.
- Supports organizational initiatives and activities.

Inspiring Trust L1
Inspiring confidence by demonstrating integrity and building credibility.

- Communicates professionally with others.
- Presents information in a clear and confident manner.
- Expresses owns views while remaining open to alternative perspectives.
- Respects other perspectives and opinions.
- Speaks well of the organization and of each other.
- Follows through on commitments.

Decision Making L1
Enabling progress by resolving issues and supporting others in taking calculated risks and making decisions.

- Makes decisions within scope of responsibility.
- Applies guidelines and procedures in making decisions.
- Gathers input / information from different sources to support decision making or further action.
- Seeks guidance when the situation is unclear.
- Applies lessons learned when making decisions.
- Supports established decisions.

Organizational Focus L1
Aligning work priorities, processes and practices to achieve the strategic direction.

- Considers the impact of own actions on others.
- Identifies obstacles to existing processes and practices.
- Supports others in the achievement of work unit priorities.