

Position Title: Client Support Advocate**Department: Human Resources****Reports to: Client Support Manager****Position summary:**

The Client Support Team (CST) is responsible for reception of all mainline incoming customer inquiries and requests, ensuring that each is accurately and efficiently directed to the appropriate department for resolution. By tracking every step of the process, the department maintains a high standard of customer service, minimizes delays, and ensures that no customer inquiry is lost or mishandled.

Key areas of Accountability:

- **Reception and Initial Contact:** CST members are the first point of contact for all incoming calls to the company. Staff are trained to greet customers professionally, understand their needs, and gather essential information.
- **Assessment of Needs:** CST members assess the customer's needs to determine the appropriate department or individual best equipped to handle the request.
- **Handoff Process:** After assessment, CST members route the call or inquiry to the correct department. This may involve live transferring the call, forwarding messages, or logging tickets for follow-up.
- **Documentation:** CST members document every interaction, including the nature of the inquiry, the customer's details, and the department or individual to whom the issue was handed off.
- **Clear Handoff Protocol:** CST members follow a standardized process to ensure that the receiving department acknowledges the handoff and accepts responsibility for follow-up and resolution.
- **Accountability Tracking:** Each staff member involved in the process, from reception to resolution, is accountable for their part. This includes tracking their adherence to protocols and their effectiveness in managing handoffs.
- **Tracking Software:** All customer interactions are logged in a Customer Relationship Management (CRM) system or equivalent tracking software. This system records every step of the process, from initial contact to final resolution.
- **Status Updates:** CST members ensure systems are accurate and reflect the current status of the inquiry, including when it was handed off, who is responsible, and when the customer can expect a resolution.
- **Other duties as assigned:** i.e. Compassionate Condolences Program.

Qualifications & Required Skills:

- High school diploma or equivalent; additional education in healthcare administration or related fields is preferred.

- 2+ years customer service experience in the medical industry with demonstrated ability to work effectively and verbally build strong relationships with various customers and colleagues to facilitate smooth communication and problem resolution.
- Experience assessing customer needs quickly and determining the appropriate course of action.
- Exhibited skill in providing clear and concise written and/or verbal communications.
- Proficient using standard office software, including Microsoft Office; CRM, medical billing or call tracking programs.
- Diligence in accurately documenting customer interactions and tracking issues through to resolution.
- Skilled at effectively managing changes in procedures or workflow.
- Knowledge of HIPAA regulations and commitment to maintaining patient confidentiality.

Physical Requirements:

Must be able to remain in a stationary position for extended periods of time

Ability to sit or stand for extended periods of time

Constantly operates a computer and other office productivity machinery, such as a copy machine and computer printer

Ability to travel occasionally by car or commercial flight

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Employee Name: _____

Employee Signature: _____ Date: _____