

# Position Description

<b>Title</b>	Customer Service Administrator
<b>Location</b>	Site Specific
<b>Reports To</b>	Fitness Club Lead
<b>Direct Reports</b>	No

## About Habit Health

Our purpose is to support people in their community to optimise health and live their best life. We support people on mental and physical health journeys, helping them restore function, grow stronger, re-establish, and grow social, whanau and/or spiritual connections, be safe at work, gain independence and learn how to manage their pain.

We pride ourselves on being the best option in New Zealand for organisations looking for integrated health services at scale.



## Position Purpose

The purpose of the Customer Service Administrator role is to be the face of Habit Health (whether that be Habit Health & Fitness, Habit Rehabilitation, Southern Rehabilitation and/or Occupational Health).

This means providing the highest possible level of customer service to each and every customer by delivering personalised solutions for gym, occupational health, physiotherapy and rehabilitation services and other ancillary health products where applicable.

The Customer Service Administrator is responsible for the operation of front of house processes/systems with diligence and accuracy at all times ensuring the site meets Habit Health standards of presentation and compliance with accreditation policies and procedures.

This position description is not intended to be complete or limiting – the role will require a proactive and flexible approach to manage tasks that support a rapid and innovative environment.

## Key Accountabilities

### Customer Service

- Welcome and farewell all customers, by name whenever possible.
- Actively seek out customers in need of further information, help, and encouragement.
- Facilitate all customers, using the appropriate pre-consultation forms and procedures.
- Meet conflict with a sincere desire to surpass customer expectations.
- Maintain knowledge of all product/service areas to allow confident solution-based sales approach to all customers.
- Answer general enquiries (phone/emails) regarding clinic services.
- May be required to be First aid certified, Health & Safety representative and the site Fire Warden.

- Check and confirm site invoicing & AP (clinic specific purchases of stock and/or supplies), invoices and receipts.
- Site Petty Cash & Credit Cards. Responsible for receipts and coding of monthly spend.
- Undertake any other duties at the request of the Clinic Administration Manager/National Fitness Manager, which are commensurate with the role including project work and absence cover.
- Ensure that services are delivered in line with Habit Health values, standards, and other guidelines and contractual requirements.

#### Rehabilitation Clinic

- Clinician diary management - maximise calendar saturations, shuffle appointments (forward or back) to maximise bookings and to ensure efficient scheduling. Manage wait lists throughout each day.
- Completing and entering forms for ACC (consent forms, outcome measures, ACC45's if needed and rebooking DNA & Cancellations)
- Prompting clinicians for complete medical notes: e.g. read codes, SOTAP notes, discharges, ACC32's etc
- Actively promote physiotherapy and rehabilitation services to current and potential customers , providing a solution-based sales approach.
- Maintain high level knowledge of physiotherapist skill, areas of interest/specialty, and availability to ensure accurate matching of clients
- Maintain knowledge of accreditation policies/procedures, communicating any questions/concerns promptly
- Perform weekly Gensolve reports and communicate to Physiotherapists
- Debtor Control: customer payment on the day and weekly debtor management including client invoicing for declined ACC fees/over dues
- Stocktakes & stock control.
- Effective clinic administration – ensuring all clients are booked, rebooked or discharged as appropriate, pay for services/co-payments prior to or immediately following each session and facilitate and requesting medical note provision where requested.
- Site private contracts and billing administration.
- Effective Pre-screening clients (Consent form and outcome measure completion).

#### Diary Management

- Ensure accurate bookings, issue appointment cards and provide reminders where necessary e.g. for Physios/clinicians/Personal Trainers
- Communication of booking changes to staff involved. All induction changes to be communicated to the appropriate manager/lead.
- Accurate and timely completion of time sheet to manager, clearly identifying any variance to roster (sick or annual leave)
- Rescheduling appointments when needed, for example when a clinician is sick.
- Commitment to agreed shift rotation – shift changes will only occur under extraordinary circumstances

#### Facility Presentation

- Ensure maintenance and cleaning consistently meets standards, policies and procedures
- Correct/isolate/minimise facility or cleaning problems without delay in accordance with Health and Safety risk management plan
- Complete daily cleaning tasks, this may include but not limited to:
  - Ensure toilet paper, handwash etc. are fully stocked at all times
  - End of day dishes
  - Put out weekly rubbish and recycling
  - Tea towels and laundering
  - Ensure maintenance and cleaning consistently meets Habit standards, policies and procedures
  - Monitor cleaning contractor's performance at the commencement of each shift
  - Ensure cleaning/equipment checks are undertaken and recorded hourly/daily

## **Gym Site Only:**

### **Membership sales**

- Monitor key performance indicators at least weekly
- Be accountable for sales results both personally and as a team
- Follow tour content guidelines with regular self reflection
- Refer to communication book and check staff memo board at the start of each shift for membership promotion info, open weeks etc
- Administer prospect management/allocation considering roster changes, prospect preference or expertise needed with detailed notes
- Constantly look to make new contacts, seek referrals and generate membership leads with customer interaction

### **Personal training, massage, nutrition and counter sales**

- Maintain high level knowledge of personal trainer skill, capacity and availability. Keep in constant contact with personal training staff to ensure accurate matching of clients
- Promote services (eg. Massage/Nutrition/PT) to existing members at all times.
- Maintain knowledge of all products, actively promoting in line with marketing strategy for product placement and promotion
- Constantly look to expand over the counter sales opportunities communicating customer feedback to manager
- Maintain adequate stock levels and stock rotation at all times
- Maintain presentation of sales areas to desired levels at all times
- Maintain accurate and complete knowledge of current promotions, sales initiatives and monthly targets
- Actively maintain promotional material, delivering all material in the format and standard outlined in brand standards or as directed by manager.
- Ensure daily signage checks and optimal placement

### **Database administration**

- Closely manage administration tasks throughout each shift
- Ensure individual login used at all times
- Ensure you are familiar with database policies and procedures. If in doubt promptly check with manager prior to making change
- Communicate administration process clearly and accurately with customers
- Work to provide support to other team members and facility manager

## **General Accountabilities**

- Undertake any other duties at the request of the manager, which are commensurate with the role including
- project work and absence cover.
- Ensure that services are delivered in line with Habit Health values, standards, and other guidelines and contractual requirements.
- Understand and apply the principles of the Te Tiriti o Waitangi • Adhere to the policies and procedures.
- Adhere to the Delegation Authority Framework, and Limitation of Authorities (if any) Framework.
- Undertake training as relevant to your position.
- Participate in surveys and audits as necessary in order to enable the Company to meet its statutory requirements.
- Manage key working relationships (internal and external).
- Adhere to the professional standards of the relevant statutory body if applicable





## Key Performance Indicators

### Deliverables

- BAU – Consistently deliver accountabilities as outlined in this position description.
- Objectives – Discussed, confirmed, and documented as part of the annual performance review cycle.  
This may include:
  - Metrics
  - Projects
  - Process improvement initiatives
  - Other stretch objectives

### Core Behavioural Competencies

Please refer to SharePoint for the full descriptors.

<p><b>Customer focus*</b></p>  <p>Act with the customer in mind and ensuring the customer is at the centre of everything you do.</p>	<p><b>Motivation to achieve</b></p>  <p>Be action-oriented and respond positively to challenges and opportunities.</p>	<p><b>Teamwork</b></p>  <p>Work together constructively and put the team ahead of individual success.</p>	<p><b>Leadership**</b></p>  <p>Provide clear direction and build commitment within the team to achieve Habit Health objectives.</p>
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\*Customer is encompassing of all customer groups eg. Internal teams, clients, stakeholders etc.

\*\*Only applies to people managers and roles on pathway to leadership.

### Culture

Exemplify our vision, purpose, and values in everything that you do.

## Health and Safety

Habit Health are committed to providing a safe and healthy working environment for all staff, including contractors.

You are responsible for:

- taking reasonable care of your own and other's health and safety and being mindful of the effect of your actions (or lack of action) on the health and safety of others.
- actively maintain up to date knowledge of health and safety procedures available on SharePoint and complying with reasonable instructions, policies and procedures to ensure Habit Health are able to comply with the Health and Safety at Work Act 2015 and relevant regulations.
- identifying and reporting hazards, risks, injuries, illness and incidents (including near misses) that arise from your work or in the workplace and eliminating or mitigating health and safety risks so far as reasonably practicable and consulting with others in doing so eg. manager or health and safety representative (or other contact as appropriate).

## Qualifications, Knowledge, Skills and Experience

- 2-5 years' experience in customer service / office administration
- Current First Aid and CPR certificates (if applicable)
- Previous client relationship management experience

- Excellent organisation skills, including time management and the ability to manage a range of tasks and clients
- Intermediate level of experience and skill in Word, Excel and Outlook.
- Ability to adapt communication style to build rapport and establish credibility with a broad range of customers
- Excellent interpersonal skills