Post Specification

Post Specification - Key Information

- **Post Title Customer Services - Information & Case Management Officer**
- **Date: September 2025**
- **Post Group Number: 8802**
- **Job Family: Customer Engagement**
- **Job Family Role Profile: CE11**
- **Final Grade: 11**

To be read in conjunction with the job family role profile.

Service Area Description

The Customer Service Team are a key delivery mechanism to deal with all in person transactions, digital transactions and telephone enquiries, resolving as much as possible by a single customer service team approach.

The service area is focused on ensuring customer enquiries and issues are resolved effectively and efficiently, making every contact count and putting customers at the heart of everything we do.

Wherever possible we encourage the self-serve model and facilitate digital service delivery, reducing demand for phone and in-person interaction so resources can be focused to those most in need, ensuring customers are satisfied with their experience and that service delivery is citizen centred and seamless between services and partner organisations, promoting a “Tell us once” approach.

Purpose of this Post

Working as part of a team to provide a point of contact through multiple channels and working collaboratively to achieve our purpose.

The Information and Case Management Officer will better understand and help customers to overcome barriers to accessing services that some people experience, promoting inclusivity by working to remove barriers such as poverty, trauma, physical accessibility, neurodiversity, rurality and low income.

Key Job Specific Accountabilities

1. To improve outcomes for the residents of Westmorland and Furness by acting as first point of contact for complaints, information requests, compliments and MP Enquiries; providing an effective escalation route, advice and guidance for internal and external stakeholders through triaging and identifying the most appropriate pathway to statutory and non-statutory services.

2. To take ownership for the development and maintenance of a case management system for ensuring that the Council is open and transparent with data and that the Council’s publication scheme enables public access to good quality, relevant and timely information.

3. Seeking and valuing customer feedback to ensure the team has high levels of knowledge to provide an excellent service to customers, with resolution to their query wherever possible.

4. Engaging with advocacy organisations to ensure they can support the most vulnerable to engage with council services.

5. Empowering and supporting staff dealing directly with customers, to ensure they have the knowledge and support needed to do their job.

6. Reporting regular management information and intelligence from complaints, compliments and other statutory access to information regimes and to work with service specialists to ensure that corporate learning informs service improvement across all Directorates.

7. Take responsibility for quality assurance for complaints, compliments and other statutory access to information regimes are in place, are regularly reviewed and meet professional and regulatory standards, this will include attendance and engagement at review panels when necessary.

8. Provide subject matter expert level support for a wide range of customers, making every contact count and keeping up to date with statutory policies and internal procedures ensuring delivery of the Council Plan while being clear around what customers can and cannot expect. This includes implementing the unreasonable customer policy where necessary and monitoring unreasonable customer behaviour.

9. Demonstrate a person-centred approach to communication, having the ability to cater services towards those with protected characteristics via a range of communication channels including telephony, digital, postal communications and where necessary in person.

10. To support members of the team to work collaboratively with internal stakeholders across the organisation to determine the best outcome for the customer, promoting the customer strategy and customer charter.

11. Triage interactions to determine the appropriate officer required for allocation and identify where there may be an urgent need or escalation required in view of timescales, statutory legislation and risk factors.

12. To plan and organise own work and coordinate with team members across all teams to complete the work within a set framework, standard and with strict timescales in mind.

13. An understanding of the governing bodies the Council must report to and legal obligations, implications and risks of missing our statutory deadlines.

Please note: Annual targets will be discussed during the appraisal process.

Key Facts and Figures of the Post

Budget Responsibilities: Managing technical resources and processes within a cost centre, delivering efficiencies wherever possible.

Staff Management Responsibilities: Provide instruction, support and training in areas of work as necessary.

Other: N/A

Essential Criteria

Qualifications: (Required qualifications for the post)

- NQF or NVQ Level 4, or equivalent experience or knowledge in information governance

and/or complaints.

Knowledge: (Essential knowledge required for the post)

- ICT competent with skills relevant to customer services
- Knowledge of statutory guidance relating to service provisions within Customer Engagement.
- Delivering enhanced customer service in a non-judgemental way

Experience: (Essential experience required for the post)

- Experience of working within an office environment
- High level of influencing, negotiation, and interpersonal skills.
- Politically astute in a rapidly changing environment.
- Considerable experience in handling complaints and other requests for information from external sources.
- Application of procedures in specialist service areas.
- Ability to lead projects in a multi-disciplinary environment.

Expertise: (Essential expertise required for the post)

- Ability to work competently within a complex service area, utilising multiple channels and technology, following established processes and procedures.
- Proven experience of using databases and customer relationship management systems
- Ability to work flexibly to meet demands across the service area
- Ability to record, maintain and communicate complex information and make recommendations
- Providing information and advice and support to senior officers and elected members.
- Successful relationship building.
- Ability to apply legislation across varied service areas.

Disclosure and Barring Service (DBS) Checks

- This post does not require a DBS check.

Job Working Circumstances

Emotional Demands

Occasionally dealing with:

- Complex behaviours from members of the public and/or challenging situations
- Some general abusive language and aggressive behaviour witnessed and directed at the post holder as the representative of the Council
- Working in a high pressurised environment due to volume of workload.
- Detailed information regarding vulnerable customers and their personal circumstances.

Physical Demands

- Working at a computer screen for long periods of time

Working Conditions

- Office/Hybrid environment sometimes dealing with sensitive matters.

Other JWC Factors: N/A

Other Factors:

- To model and display the corporate standards of behaviour.
- Travelling to various locations to support colleagues in Westmorland and Furness Council.
- To undertake training to support delivery of the service
- Willingness to support emergency response activity