



HEALTHCARE MANAGEMENT TRUST

Unit 1 Langdon House, Langdon Road, Swansea SA1 8QY  
Telephone: 020 7222 1177 Email: [admin@hmt-uk.org](mailto:admin@hmt-uk.org)  
[www.hmt-uk.org](http://www.hmt-uk.org)

|                                    |                                                                                                                                                                                                                |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Job Title</b>                   | <b>Customer Experience Advisor</b>                                                                                                                                                                             |
| <b>Department</b>                  | Central Contact Centre                                                                                                                                                                                         |
| <b>Reports to (job title)</b>      | Transformation & Change Manager                                                                                                                                                                                |
| <b>Direct and Indirect Reports</b> | No                                                                                                                                                                                                             |
| <b>Job Grade</b>                   | TBC                                                                                                                                                                                                            |
| <b>Working Pattern</b>             | Rota-based shifts across Contact Centre operating hours of 8:00am to 7:00pm, Monday to Friday.<br><br>Shift patterns may include 8:00am–4:00pm, 9:00am–5:00pm and 11:00am–7:00pm, in line with service demand. |

#### Who we are

At the Healthcare Management Trust, we are obsessed with achieving our **Vision**, “to be the most innovative and best quality provider of niche health and social care services.”

Our **Purpose** is, to make every contact count, ensuring every resident and patient receives the best possible experience and outcome.

We aim to provide services which value collaboration and place our residents, patients and people at the heart of all we do. We will always do the right thing for our residents, patients and people.

We will be outwardly connected to the most innovative practices and service offerings in the market. We will do things differently and will be bold with our ambition to change things for the better.

We are passionate about what we do and so are our people. Bringing their most authentic selves to work and seeking joy and fun in what we do.

We will deliver care and clinical interactions compassionately and tailor them to individual needs.”

We achieve this by living our business **Values** every day:

- We are **caring**
- We are **enterprising**
- We are **resourceful**
- We are **authentic**
- We are **accountable**

As a result, we are able to give back to the people and communities we serve by delivering on our **Charitable Mission** to, “Provide quality and innovative care solutions to those with complex needs within marginalized community settings.”

Date Choose an item.



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### What you'll be doing (your job purpose)

As our Customer Experience Advisor, you will play a key role in delivering a high-quality, responsive and compassionate experience for patients, residents, relatives and customers across HMT services.

Working within the Central Contact Centre, you will support customer journeys across two hospitals and four care homes, managing a mixture of inbound and outbound activity including telephone calls, web enquiries, emails, bookings, follow-ups and customer progression.

You will support Self-Pay and Private Medical Insurance pathways, helping customers understand the next step, progress their enquiry, access the right service and receive timely and accurate communication. Every contact should be handled with care, professionalism and attention to detail, ensuring information is recorded accurately and that confidentiality, safeguarding and information governance standards are maintained.

The role is central to making every contact count and supporting a positive, consistent customer experience across the Contact Centre.

### Your key accountabilities and responsibilities

- Handle inbound customer enquiries via telephone and email, acting as a central first point of contact for the organisation's services.
- Manage outbound activity including follow-up of enquiries, booking confirmations, reminders, post-consultation progression and service recovery.
- Support the receipt, triage and coordination of radiology referrals, ensuring referrals are handled appropriately and appointments are booked in a timely and accurate manner.
- Book outpatient consultations, diagnostic tests and radiology appointments in line with clinical guidance, service availability and agreed processes.
- Provide clear, consistent and accurate information to patients regarding services, pathways, fees, funding routes and appointment processes.
- Accurately record all patient interactions, outcomes, consents and funding details within patient administration systems and CRM platforms in real time.
- Issue appointment confirmations, reminders and follow-up communications in line with Information Governance and GDPR requirements.
- Identify and appropriately escalate clinical, safeguarding or service-related risks in line with organisational policy.



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- Participate in team briefings, quality assurance activity, training and continuous improvement initiatives to support service development.
- Undertake any other reasonable duties aligned to the evolving needs of the Contact Centre and Bookings service.
- Work collaboratively with colleagues across the Contact Centre, hospitals, care homes, clinical teams and central support functions to support a seamless customer journey.
- Work to agreed KPIs and service standards, including quality, responsiveness, activity levels, booking progression, follow-up completion and customer experience.
- Identify opportunities to improve customer experience, service delivery and operational efficiency.

#### General responsibilities

- To be responsible for the health, safety and welfare of yourself and others whilst at work, including colleagues, residents and visitors to the Home and for alerting the officers responsible to any hazards or potential risks to health and safety.
- To be fully conversant with the HMT policies relating to Safeguarding of Vulnerable Adults and Whistleblowing.
- To ensure compliance with the HMT Information Governance Policy and GDPR, maintaining an appropriate level of confidentiality around issues that may be personal or commercially sensitive.
- To ensure compliance with National and local Infection Prevention and Control guidance and policies
- Establishing and maintaining positive working relationships both with colleagues, residents, visitors and other health professionals and agencies.
- To act as an ambassador for the HMT company Vision. Ethos and Values.
- To promote equality and diversity at all times and across all work activities, with an emphasis on protected characteristics and promoting Fairness, Respect, Equality, Dignity and Autonomy (FREDA)
- To adhere to HMT policies and procedures.
- Attend mandatory training days / courses, on or off site, as per contractual agreement and role requirement
- To undertake any other duties and accountabilities which would be lawful, reasonable and appropriate to the role.

#### Your knowledge, skills and experience

Experience working in a contact centre, bookings, patient services or customer-facing role.

Essential

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|                                                                                                                 |           |
|-----------------------------------------------------------------------------------------------------------------|-----------|
| Strong communication skills with the ability to explain services, pathways and fees clearly and empathetically. | Essential |
| Experience handling both inbound enquiries and outbound follow-up activity.                                     | Essential |
| Objection handling; ability to explain services and fees/funding simply                                         | Essential |
| Confident using patient administration systems, CRM platforms and Microsoft 365 tools.                          | Essential |
| Experience working within a regulated or healthcare environment (desirable).                                    | Desirable |

#### Your training and qualifications

|                                                           |           |
|-----------------------------------------------------------|-----------|
| Minimum of GCSE English and Mathematics                   | Essential |
| NVQ/BTEC (Customer Service/Administration/Contact Centre) | Desirable |
| Training in information governance / data protection      | Desirable |

#### Aptitude and Abilities

|                                                                                                 |           |
|-------------------------------------------------------------------------------------------------|-----------|
| Ability to manage multiple workstreams and competing priorities effectively.                    | Essential |
| Strong organisational and time management skills.                                               | Essential |
| Ability to work autonomously while following agreed processes and escalation routes.            | Essential |
| Confidence in handling sensitive, complex or emotive conversations with patients and referrers. | Essential |

#### Disposition / Attitude / Motivation

|                                                                               |           |
|-------------------------------------------------------------------------------|-----------|
| Patient-focused, compassionate and professional approach to service delivery. | Essential |
|-------------------------------------------------------------------------------|-----------|

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|                                                                                              |           |
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| Adaptable and resilient, with a positive attitude to change and service development.         | Essential |
| Motivated by delivering positive patient outcomes as well as operational performance.        | Essential |
| Demonstrates accountability, integrity and commitment to organisational values at all times. | Essential |
| Understands the importance of confidentiality and dealing with sensitive information         | Essential |

#### The way we do things at HMT (our Behaviours)

*\*See Appendix 1 attached*

**Note:** This job description is an outline of the job, setting out general responsibilities and tasks the job holder may be required to undertake. It is not an entire reflection of the role and you may be required to carry out other duties and responsibilities from time to time. The job description will also be subject to change in-line with the needs of the business.

Team members will be expected to carry out their duties in line with their terms and conditions and contract of employment, the standards stated in the employee handbook and Health & Safety guidelines and will be required to follow HMT policies and procedures.

We require that mandatory training is current and will expect you to participate and undertake further developmental training specific to the role.

I have received a copy of this Job Description; read it, understood it and agreed to it.

Signed.....

Date.....

Job Holder

Date Choose an item.