



HEALTHCARE MANAGEMENT TRUST

Unit 1 Langdon House, Langdon Road, Swansea SA1 8QY
Telephone: 020 7222 1177 Email: admin@hmt-uk.org
www.hmt-uk.org

Job Title	Outbound Bookings Advisor (Warm Leads)
Department	Outbound Bookings Team
Reports to (job title)	TBC
Direct and Indirect Reports	No

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** each and 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.”*

What you'll be doing (your job purpose)

Date Choose an item.



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To proactively contact warm leads from website enquiries, QR-captured open-day sign-ups and marketing campaigns, convert these into booked outpatient appointments, and follow through post-consultation to progress appropriate cases into diagnostics and procedures, delivering a compassionate, efficient experience that reflects our clinical standards and brand.

Your key accountabilities and responsibilities

- Make timely outbound calls to warm leads within the agreed speed-to-first-contact SLA (typically 24–48 hours from capture).
- Hold informed, empathetic conversations that qualify needs, address questions/objections, and secure a booking or a firm next step with date/time.
- Execute a structured follow-up cadence (e.g., Day 0 / Day 2 / Day 5) using phone, SMS and email to maximise contact and conversion.
- Track outcomes across the patient journey; proactively follow up after consultation to progress eligible patients to diagnostics/procedures where appropriate.
- Record every interaction in the CRM/patient administration system in real time with accurate demographics, consent, funding and outcomes.
- Produce daily activity updates and maintain a clean lead pipeline that supports KPI reporting and forecasting.
- Provide clear, accessible information about services, fees/funding and locations; escalate clinical/safeguarding concerns appropriately.
- Uphold information governance, GDPR and contact-preference rules; issue written confirmations (email/SMS) in line with policy.
- Share lead-quality feedback with Marketing and recurring questions to refine scripts/FAQs; participate in daily huddles, weekly coaching and QA reviews.
- Undertake other reasonable duties aligned to the role as required by the service.

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.

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- 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	
Outbound calling / conversions experience (healthcare, bookings, customer sales/service)	Essential
Strong customer service with empathetic, clear communication	Essential
Confident using CRM/telephony and Microsoft 365; fast, accurate note-taking	Essential
Objection handling; ability to explain services and fees/funding simply	Essential
Target-driven mindset; comfortable working to KPIs	Essential
Healthcare or regulated-services experience	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	
Able to prioritize workload	Essential
Effective time management skills	Essential

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Ability to use initiative and make decisions under guidance from line manager	Essential
Effective interpersonal skills	Essential

Disposition / Attitude / Motivation	
Excellent communication skills, written and oral	Essential
Able to motivate and support others	Essential
Encourage effective team working	Essential
Ability to work independently and as part of a team	Essential
Understands the importance of confidentiality and dealing with sensitive information	Essential

The way we do things at HMT (our Behaviours)
<i>*See Appendix 1 attached</i>

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.