



Membership and Finance Assistant

ROLE PURPOSE

This role will support both the Finance Officer and Customer Sales Manager to ensure timely collection of membership subscription income and provide customer support to PACEY members.

You will address customer queries quickly, accurately, and confidently over a variety of communication methods (phone, email, social media and text chat services), requesting and recording all required information in line with processes and procedures.

You will effectively maintain the Sales Ledger and Customer Relationship Management (CRM) database through; the processing of income from sales of membership, recording income data within the CRM and in PACEY's financial systems.

You will promote, sell and process membership, services, and products.

Position in organisation

Department: Membership and Marketing

Team: Customer Services

Reports to: Customer Services Manager

Key responsibilities

Finance

- Carrying out direct debit collection process through CRM.
- Recording direct debit including, Addacs submissions and reports, bank submission and failed payments.
- Recording credit card/debit card transactions
- Recording of sales transactions and splitting income between PACEY and PACEY Services Ltd
- Follow up on failed payments, ensuring timely resolution and accurate record-keeping.
- Demonstrate strong attention to detail to ensure all processes are completed correctly and efficiently.
- Invoicing sales to funders and other customers to agreed timescales on the Finance ledger system



- Communicating with members, funders and staff to assist the resolution of outstanding queries with PACEY invoicing
- Debtor Management: chasing overdue items, issuing statements, resolving queries
- Regular debtor reporting
- Covering for critical tasks of the other Finance roles as and when required

Membership

- Deliver accurate and efficient customer services to members and non-members over a variety of communication methods (phone, email, social media and text chat services) accurately recording required information on the CRM and other PACEY systems
- Improve recruitment and retention through a variety of communication methods including engaging with potential, renewing and lapsed members
- Maintain an up-to-date knowledge of PACEY benefits, work and other partnerships that support members and customers so every interaction can be used as an opportunity to highlight new products, service or remind contacts of value of PACEY
- Manage any calls effectively and efficiently and use member admin calls as opportunities to support members to use the MyPACEY portal so they can self-service more effectively
- Deliver agreed sales and marketing activity to promote PACEY products and services so income targets are met
- Maintain accurate customer and member records on the CRM system including all financial information required (payment status, payment method, etc) and flagging any concerns, queries, or inaccuracies to line manager. Where relevant identify further opportunities for system or process improvement and share with line manager
- Report customer service satisfaction feedback and other customer data as required to colleagues to help improve overall service.

Any other duties commensurate with the nature and level of the post required in order to deliver the job's key responsibilities.

To work within organisational policies, code of conduct and practices.

This job description does not form part of a contract of employment and can be amended from time to time as the needs of the organisation require.



Person specification

	Essential
Experience	<ul style="list-style-type: none"> • Experience of working in a membership or customer services team • Experience of dealing with member/customer queries/issues across various methods of communication • Use of CRM systems to accurately create and maintain membership/customer records
Skills and abilities	<ul style="list-style-type: none"> • Confident and personable telephone manner, with excellent communication skills, both written and verbal • Excellent levels of accuracy and attention to detail • Ability to promote and sell membership, services and products • Ability to remain calm and polite when dealing with complaints or challenging customers • Strong IT skills, especially in Outlook, Excel, Word, and CRM. • Able to work as part of a team and recognise the importance of the role. • Demonstrate anti-discriminatory practice in all areas of work.
Knowledge	<ul style="list-style-type: none"> • Excellent understanding of customer service principles and practices • Excellent working knowledge of CRM tools • Good understanding of compliance in data processing and protection • Knowledge of the early years and childcare sector
Qualifications and training	Customer Services relevant qualification or equivalent

Grade F (36 hours per week, hybrid working- 1 day in Bromley office every 2 weeks). £24,852 + OLW

12 month FTC with possibility of becoming permanent



How to apply

Please send your CV and cover letter to kalai.brightley-hodges@pacey.org.uk by Monday 17th February.

Please note, due to the high volumes of applications, we will not be able to respond to everyone.

Interviews will be held w/c 24th February.