



POSITION DESCRIPTION

Job Title:	Supporter Care Assistant
Team/Group:	Fundraising and Partnerships
Job Reports to:	Supporter Care Team Lead
Location:	Te Whare Manawanui office, Ellerslie
Job Purpose:	The primary objective of the Supporter Care Assistant is to deliver the highest quality supporter care service aligning with best practice fundraising disciplines to build continued loyalty with our supporters, help deliver improved life time value, drive increased revenue and improve supporter engagement with our cause by being the true guardians of supporter stewardship.
Group Objective:	To deliver sustainable net voluntary income by engaging the New Zealand public in fundraising for the Heart Foundation through direct and relation-based programmes. Additionally a key focus is to maximise the contribution from key partners to the Heart Foundation's strategic goals and engagement deliverables.
Reporting Structure/Direct Reports:	No direct reports
Key Responsibilities/Tasks:	<p>1. Outbound Calls</p> <ul style="list-style-type: none"> • Carry out outbound calling to thank donors for gifting donations up to \$5,000, and find lead generation for potential mid value, major gifts and bequest leads. • Carry out outbound calling to welcome new donors and lottery supporters to the respective programmes with. • Carry out outbound calling for decline management for both failed payments for Heart Savers (Regular Givers) and Lottery (Auto-Buyers) achieving targets as set for decline management and information updates. • Carry out outbound calling for lapsed or cancelled donors and lottery supporters to achieve set and agreed "save" targets, by meeting the needs of the donors. • Carry out outbound calling for Heart Savers (Regular Givers) upgrades on an annual basis to achieve set targets. • Steward Peer to Peer fundraisers to ensure they achieve their agreed revenue targets for fundraising events (such as MyMarathon) and help to set up their fundraising profiles in the appropriate fundraising platforms. • To support the management of escalations and exceptions from the inbound processing company, ringing customers to resolve queries in order to be able to process their order in a timely fashion.



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2. Inbound Calls and Activity

- To be the face of customer service and support for donors and lottery customers who call the Heart Foundation directly and ensure that they are left with an experience that provides personal, tailored and exceptional customer service.
- To manage escalation calls from the external call centre if first call resolution has not been achieved.
- To discuss with supporters their communication preferences and work to save customers by reducing mailing volumes rather than removing them from the database.
- To work with supporters that wish to cancel their regular instruction (Heart Savers or Auto-Buyers) providing them with step down options in order to retain them.
- Respond and manage customer complaints ensuring that the supporters' issues are resolved in a manner that leaves the supporter with a positive experience of the Heart Foundation.
- Respond to all inbound correspondence from supporters in a timely manner.

3. Written Communication

- Respond to all written complaints or enquiries from supporters by email, letter or social media in a timely manner, ensuring a positive experience and delivering excellent customer service.
- Ensure all request for information packs or materials are fulfilled and recorded in the system.
- When outbound calling resolution cannot be achieved, ensure that all outbound communication that is set up in relation to the activity is sent to the supporter via email or mail.
- Write personalised handwritten cards and thank you notes to supporters, fundraisers, volunteers and organisations as required.

4. Database

- Process all orders forwarded as exceptions management from the inbound processing company, including processing of donations and lottery orders.
- Process Individual Giving, Regular Giving and Lottery orders as required.
- Maintain integrity of information held on the supporter database, updating information where required.
- Ensure all communications, written or by phone is recorded on the database including detailed notes of interactions and all customer requests actioned.



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	<p>5. Other</p> <ul style="list-style-type: none"> • Contribute to a strong Heart Foundation culture by developing and maintaining collaborative internal working relationships. • Participate in broader organisational initiatives e.g. provide input to organisation wide planning, surveys as required. • Participate in the Fundraising and Partnership Team in a collaborative manner to support fundraising, marketing and supporter care strategies and plans and implement agreed priorities. • Perform other duties from time to time as reasonably required by the Supporter Care Team Leader and/or Direct Marketing Manager. • Maintain current CPR practicing status in accordance with Heart Foundation policy.
<p>Key Relationships:</p>	<p>Internal</p> <ul style="list-style-type: none"> • Head of Fundraising & Partnerships • Finance team • Data Services Manager • Philanthropy and Partnerships Manager • Fundraising and Partnerships Programme Leads • Other HF staff and volunteers <p>External</p> <ul style="list-style-type: none"> • Suppliers as required • Supporters
<p>Key Capabilities needed to succeed:</p>	<ul style="list-style-type: none"> • A commitment to the values of the Heart Foundation • Proven customer service skills with experience working in a customer service role or call centre • Excellent written and verbal communication skills • Ability to build trust and rapport quickly • Demonstrate patience and good listening skills • Ability to self-manage and prioritise workloads • Effective computer and accurate keyboard skills along with proven database experience • Excellent attention to detail

The job description above gives a general overview of the role and level of work to be performed by the incumbent. It is not a prescriptive list of all responsibilities and skills required. Reasonable changes to the role may be made if appropriate.