

JOB EXPECTATION

Title: Customer Service Specialist (CSS)

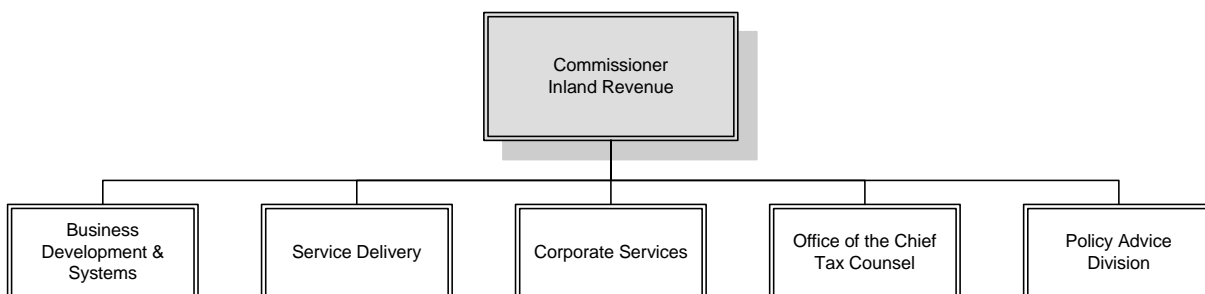
Reports to: Team Leader, Assistance

About Inland Revenue

Inland Revenue plays a critical role in improving the economic and social wellbeing of New Zealanders. Inland Revenue collects 85% of the Crown's revenue as well as collecting and disbursing social support programme payments and providing the government with policy advice. We are working to achieve a desired future where:

- Inland Revenue is responsive in meeting the changing and increasing expectations of government and society.
- We make it easy for customers to get it right and hard to get it wrong.
- Society has confidence that appropriate action will be taken against customers who do not comply.
- Increasingly, paying tax is seen as contributing to society.
- We are professional, approachable, effective and efficient.

Inland Revenue is structured into five main areas of business:



To find out more about who we are, our structure and purpose, the services we provide and our commitment to the community visit www.ird.govt.nz. Our website will also tell you more about our commitment to our people and the range of benefits available to our staff.

Job Expectation

To achieve our desired future as set out in Inland Revenue's strategic plan, *Our Way Forward*, it is critical that Inland Revenue is an agile and responsive organisation. To support this, the Job Expectation for the Customer Service Specialist position sets out the key skills, attributes, accountabilities, competencies, and behaviours expected of all job-holders within the fundamental and applied levels of the position. In addition, an appendix is attached to this document, which sets out details of the business units of Assistance where the Customer Service Specialist will operate within.

Best Suited Criteria

For recruitment purposes candidates may not be required to be fully competent in all areas of the job expectation. When recruiting for this position, the Recruitment Panel will develop the best-

suit criteria required for that particular vacancy to be filled using the key skills and attributes, competencies, and behaviours set out in this Job Expectation.

The Role of Assistance

Assistance is the 'public face' of IR and manages the key contact points between Inland Revenue and its external customers. We aim to provide services that meet the needs of our customers and fulfil our commitments to the customer charter.

Assistance works together to deliver a consistent customer experience and encourage compliance. We strive for an integrated, cost-effective customer service which adds value to our customers and the organisation, alike, whilst reducing the customers need for multiple contacts.

Position Purpose

The Customer Service Specialists position is to serve Inland Revenue's diverse range of customers and deliver a high quality and consistent customer experience that meets their needs and expectations. The position operates in a multi channel environment and supports customers across a wide range of Inland Revenue products and services.

Customer Service Specialists engage with customers across a number of channels and deliver services by providing the appropriate information, advice and education. They work closely with customers to resolve a range of compliance issues or enquiries, and maintain the integrity of customer information. Customer engagement will be both reactive, and proactive through targeted campaign work. This position supports and helps customers to meet their obligations, receive their entitlements, and promote and maintain voluntary compliance.

Position Description

The Customer Service Specialist will develop an understanding of Assistance and apply this knowledge to meet the needs of our customers and manage work priorities. The core skills, knowledge and competencies will be developed through development and experience on the job. The position is organised into two levels, Fundamental and Applied. Fundamental provides the foundation of the role in Assistance, where knowledge and experience of the customers, products and services are initially developed. The Applied level will develop staff to work right across the range of Assistance business and build transferable skills and capabilities. Progression through the two levels can be achieved by acquiring and demonstrating the skills and knowledge necessary within each level.

The two levels are described below:

FUNDAMENTAL	APPLIED
<p>This is the primary entry point into the Assistance unit</p> <ul style="list-style-type: none"> ➤ The work is high volume, transactional in nature ➤ Work processes are well defined ➤ Decision making is governed by legislation, IR policies/procedures and established decision trees ➤ Focussed on a small number of products and/or customer segments ➤ Maintains customer information, and performs account maintenance ➤ Educates customers in available channels, services and products ➤ Has a fundamental understanding of legislation, customer responsibilities and entitlements ➤ Works in a fully supervised and supported environment 	<p>Builds upon the Fundamental skill set and responsibilities</p> <ul style="list-style-type: none"> ➤ Is knowledgeable of a wider range of products and/or customer segments ➤ Develops a deep knowledge of legislation, customer responsibilities and entitlements ➤ Supports and navigates customers through the channels, services and products that IR offers ➤ Identifies, liaises and works with subject matter experts to resolve customer or compliance issues ➤ Handles complicated work requiring research and problem solving ➤ Probes and questions to better identify and understand the real issues ➤ Establishes a full and accurate assessment of customers and/or case circumstances ➤ Able to match the most appropriate

<ul style="list-style-type: none"> ➤ Multi channel – full range of communication channels ➤ Promotes new products and self management channels 	<p style="margin-left: 20px;">treatment to a customers and/or case circumstance</p> <ul style="list-style-type: none"> ➤ Works with minimal supervision in a supported and self managed environment
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Accountabilities & Outcomes

The key outcome of the position is to engage customers across a range of communication channels and deliver services by providing the appropriate information, advice and education. Individual performance goals and measures for delivering successful results in this position will be agreed between the Customer Service Specialist and their manager as part of the annual Performance Management cycle.

The accountabilities of the Customer Service Specialist position are detailed below, and shown at the two levels, Fundamental and Applied. The applied level includes and builds on the accountabilities already outlined at the fundamental level.

1. Consistent Customer Service

At both levels a Customer Service Specialist is expected to:

- Engage with customers in a professional manner to resolve their enquiries and compliance issues
- Provide a quality and consistent customer service experience to all customers regardless of the contact communication channel they choose
- Provide clear, accurate and relevant information or options
- Communicate effectively using the full range of questioning techniques, active listening and paraphrasing to quickly establish a rapport with our customers
- Tailor the service provided to meet the individual needs of our diverse customers
- Respond promptly and thoroughly to customer enquiries and requests
- Value every customer contact, regardless of the issue raised or the method of the contact
- Manage the referral of customers between services in a smooth and efficient manner
- Educate customers about our products and services, and promote self management opportunities

2. Managing Work and Delivering Results

At both levels a Customer Service Specialist is expected to work across contact communication channels to meet customer demand and:

- Contribute fully to a positive team culture and work environment
- Demonstrate flexibility and adaptability in a changing environment
- Take ownership in managing time and work assignment consistent with Assistance values
- Strive to meet the agreed outcomes and resolve customer issues or enquires

FUNDAMENTAL	APPLIED
<ul style="list-style-type: none"> ➤ Carries out work under supervision and guidance ➤ Identifies opportunities for service improvements ➤ Identifies when customer requires referral, and engages colleagues in the resolution of the enquiry 	<ul style="list-style-type: none"> ➤ Plans and organises own workload within agreed priorities ➤ Produces quality work within agreed timeframes ➤ Contributes to continuous improvement and develops recommendations for change ➤ Contributes to planning activities as required

3. Decision Making

This section describes the level, impact and complexity of the decisions made by the Customer Service Specialist at the Fundamental and Applied levels. The decisions made at either level are made within the prescribed legislative framework and with the support of appropriate knowledge tools.

FUNDAMENTAL	APPLIED
<ul style="list-style-type: none"> ➤ Reaches decisions using reference tools, decision trees and other resources ➤ Decisions are supervised and subject to quality checking to ensure consistency, accuracy and to identify development needs ➤ The work and decisions made are straightforward and similar in nature ➤ Decisions are made within restricted delegations and low risk environment ➤ Understands when a customer inquiry requires escalation or referral 	<ul style="list-style-type: none"> ➤ Able to follow complex decision making processes across multiple products ➤ Uses departmental resources to reach a decision which may involve subject matter experts across the organisation ➤ Identifies and assesses a wide range of information and applies the decision making process to reach the best solution ➤ Has the ability to research surrounding information sources ➤ Refers to appropriate case law, legislation and policy when making decisions ➤ Recognises the wider impact of decisions on future customer compliance ➤ Recognises when a compliance enquiry or issues need referral and involves appropriate people in the decision process ➤ Applies legislation and reaches agreement with customers on the resolution of compliance issues

4. Problem Solving

Problem solving is a key aspect of the position. At the Fundamental level the enquiries and problems to solve will be low complexity and risk, more routine in nature and resolved through standard approaches. At the Applied level problems will have more complexity or sensitivity and a wider range of solutions will need to be considered and applied.

FUNDAMENTAL	APPLIED
<ul style="list-style-type: none"> ➤ Identifies familiar compliance problems ➤ Resolves straight forward problems for customers ➤ Follows instructions to solve straightforward problems ➤ Recognises when problems are outside of their experience and need referral ➤ Understands and follows the referral process ➤ Directs customers to information and solutions that promote self management 	<ul style="list-style-type: none"> ➤ Identifies, analyses and suggests possible solutions for problems at hand ➤ Deals with non standard enquiries and issues ➤ Breaks down and works through complex problems and issues to develop solutions ➤ Has a deep knowledge of the resources available to assist in solving the problem ➤ Works collaboratively with subject matter experts and other resources to solve problems ➤ Identifies root causes of non compliance and makes recommendations for improvements in guidance materials, processes etc.

5. Relationships

Building and maintaining relationships is a key accountability for the Customer Service Specialist position. A key relationship will be with our diverse customer base, tailoring our approach for individual customers and establishing a positive rapport that resolves compliance enquiries or issues and that promotes compliant behaviour for the future.

FUNDAMENTAL	APPLIED
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<ul style="list-style-type: none"> ➤ Works closely with team leader to understand priorities and the work to be done ➤ Engages with immediate colleagues, help desk and other support to resolve process related issues ➤ Contributes positively to the team environment and draws on knowledge and experience of work colleagues to develop skills to serve our customers 	<ul style="list-style-type: none"> ➤ Works with team leader to understand and/or identify work priorities ➤ Provides support and mentoring to less experienced colleagues ➤ Works with subject matter experts and other specialist to resolve customer enquiries or compliance issues ➤ Involves specialists from other organisations in their work as necessary ➤ Works collaboratively across other organisations to serve IR customers
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6. Health & Safety

The Customer Service Specialist is responsible for supporting and upholding IR's Health & Safety policies and practices, legislative and ACC Workplace Safety Management Practices by:

- Ensuring that no action or inaction by them causes harm to themselves or others
- Taking actions that maintain the health and safety of themselves and others
- Accurately reporting all accidents, incidents, symptoms of discomfort and near misses
- Identifying and reporting workplace hazards
- Actively participating in health and safety training
- Actively participating in their own rehabilitation, in the event of an injury or illness
- Ensuring they adhere to their responsibilities set out in the Health and Safety Manual

Key Skills & Attributes

In addition to the IR core competencies set out in this Job Expectation, it is essential that the Customer Service Specialist possesses:

1. Personal Attributes

FUNDAMENTAL	APPLIED
<ul style="list-style-type: none"> ➤ Listens and takes direction ➤ Eagerness to learn and develop new skills and knowledge ➤ Sound written and oral communication ➤ Strong customer focus and commitment to delivery of service ➤ Ability to identify, respond to and provide a high standard of service to a wide range of customers recognising the cultural diversity of people in New Zealand ➤ Insight, awareness and empathy towards individual customer circumstances ➤ Excellent interpersonal skills to manage relationships with colleagues and customers ➤ Shows emotional resilience with difficult customers or situations ➤ Works successfully as part of a team ➤ Interacts well with a diverse range of other people showing flexibility, adaptability, and the capability to work well under pressure in a changing environment 	<ul style="list-style-type: none"> ➤ Understands a wide range of legislation, policy and process ➤ Prioritises and self manages work within specified timeframes to meet delivery commitments ➤ Develops the commercial awareness and business acumen required to interpret the customer's queries and needs and to tailor the style of engagement appropriately ➤ Able to identify and rectify issues and influence positive outcomes for customers and our organisation ➤ Shows emotional resilience with difficult customers or sensitive circumstances ➤ Works closely with customers and their representatives to find enduring solutions to compliance issues

2. Experience In

FUNDAMENTAL	APPLIED
<ul style="list-style-type: none"> ➤ Customer service environment 	<ul style="list-style-type: none"> ➤ Situations where strong persuading,

<ul style="list-style-type: none"> ➤ Dealing with people and working with them to resolve issues or understanding their problems 	<p>influencing and negotiation skills are required</p> <ul style="list-style-type: none"> ➤ Applying legislation to situations to reach a desirable outcome
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3. Technical Competencies

Technical competencies may be changed from time to time, reflecting changes in the tasks, skills and knowledge required. Opportunities for the position holder to maintain and develop their technical competencies will be available, including self directed learning, coaching, training and other development methods.

Technical competencies for development will be agreed between you as the position holder and your manager as part of the annual Performance Management cycle.

Delegations

- HR Delegations:** Nil
- Financial Delegations:** Nil
- Revenue Delegations:** Group A

Relationship Diagram

	<p>Reports to: Team Leader</p> <ul style="list-style-type: none"> The job holder works with their manager/team leader on maintaining strong internal and external customer relationships. The job holder contributes by making suggestions regarding quality and service improvement. <p>The job holder supports their manager/team leader during change by implementing new work practices.</p>	
<p>Collaborates:</p> <ul style="list-style-type: none"> The job holder is accountable for building positive, effective and collaborative relationships with other people in Inland Revenue to share knowledge, ideas and efficient work practices and processes. <p>Examples below (not exhaustive):</p> <p><u>Fundamental level:</u></p> <ul style="list-style-type: none"> Team Leader Helpdesk Coach/Buddy Peers <p><u>Applied level:</u></p> <ul style="list-style-type: none"> Team Leader Helpdesk Coach/Buddy Peers Project Groups Legal Technical Services Technical and Services Advisor <p>External specialists</p>	<p>The Customer Service Specialist Position:</p> <ul style="list-style-type: none"> The job holder completes their tasks and delivers outcomes to organisational policies, practices and quality standards. Their engagement with customers has a very direct effect on Inland Revenue's public profile within our society. The outcomes the job holder is responsible for can be measured immediately and up to 3 months. The job holder focuses on the quality of the immediate tasks in hand and uses practical judgement to ensure resources are used fully. 	<p>Liases:</p> <p>The job holder builds and maintains positive and effective working relationships with relevant internal customers and external agencies to support and achieve organisational outcomes.</p> <p>Examples below (not exhaustive):</p> <ul style="list-style-type: none"> Team Managers Portfolio Managers Assistance Managers <p><u>At the Applied level :</u></p> <p>External</p> <ul style="list-style-type: none"> Ministry of Social Development Study Link Courts and court related customers Tax Agents Employers <p>Internal</p> <ul style="list-style-type: none"> Legal Technical Services Technical and Services Advisor Processing Issues Contact Team (PICT) helpdesk

Core Organisational Competencies: Customer Service Specialist

Inland Revenue's seven core competencies are an important part of improving the way we do business through the way we manage ourselves and our work, and the way we contribute to the team. They are also required for the business to achieve its vision and strategic direction.

<p><i>These Customer Focus PI's support the following Leadership Expectations: Raising the Bar, Value Difference, Achieve Outcomes, Outward Looking.</i></p> <p>Respond to the needs of internal and external customers and take responsibility for ensuring follow up action.</p> <p>Encourage and recommend on customer feedback and suggestions for improvement to IRD services and products.</p> <p>Project a positive public image for Inland Revenue.</p> <p>Provide a professional, quality service as set out in the Charter such that:</p> <ul style="list-style-type: none"> ▪ The right information is given the first time ▪ All commitments of action are met ▪ All acts and tasks are conducted to a high standard ▪ Appropriate questions are asked to identify concerns and underlying problems ▪ Issues are escalated at the appropriate time ▪ Information is treated as confidential. <p>Tailor service provided to appropriately meet the diverse needs of customers such as:</p> <ul style="list-style-type: none"> ▪ Cultural requirements ▪ Recent history / past interactions ▪ Personal circumstances / emotions ▪ Type of advice required. <p>Identify better ways of doing things to provide continuously improving customer service.</p> <p>Proactively and responsively manage relationships with key customer / community groups.</p> <p>Provide support to colleagues and discuss difficult customer interactions with the aim to learn from them.</p>	<p><i>These Achievement Focus PI's support the following Leadership Expectations: Walk the Talk, Courage, Raising the Bar, Achieve Outcomes.</i></p> <p>Achieve the agreed outputs or results within the determined quality standards.</p> <p>Apply drive, energy and enthusiasm for getting the job done.</p> <p>Take personal responsibility for making things happen.</p> <p>Show commitment to improving results, identifying and developing opportunities for improving systems and processes and encourage others to do the same.</p> <p>Understand the processes needed to do the job effectively and why these processes are used to achieve the desired results.</p> <p>Demonstrate flexibility and adaptability in approach to work.</p>	<p><i>These Analysis and Decision Making PI's support the following Leadership Expectations: Walk the Talk, Value Difference, Outward Looking, Future Orientation)</i></p> <p>Make sense of large amounts of information, getting to the heart of the problem quickly.</p> <p>Make effective and timely decisions based on consideration of the facts and alternatives available.</p> <p>Consider and understand the implication of judgements on the business both locally and nationally.</p> <p>Analyse problems from different points of view.</p> <p>Consult with others in making decisions whenever appropriate.</p> <p>Accept responsibility for own decisions.</p> <p>All decisions are consistent with and support broader organisational goals, legislative requirements and departmental policies.</p> <p>Develop and explain the reasoning behind judgements, conclusions and decisions.</p> <p>Step back and reflect on the environment, drawing conclusions from what you see.</p>	<p><i>These Communication PI's support the following Leadership Expectations: Courage, Value Difference, Well-Being, Outward Looking, Future Orientation.</i></p> <p>Accurately and clearly convey timely information and ideas, using a style and manner of presentation that meets the diverse needs of the audience.</p> <p>Establish, build and maintain relationships and networks both internally and externally.</p> <p>Treat people with respect and courtesy recognising their needs and views.</p> <p>Deal with people in an honest and straightforward manner.</p> <p>Present effective arguments to influence others and achieve negotiated solutions.</p> <p>Anticipate and prepare for other people's reactions to communications.</p> <p>Demonstrate active listening skills (eg paraphrasing, attentive, receptive).</p>	<p><i>These Self Management PI's support the following Leadership Expectations: Walk the Talk, Courage, Raising the Bar, Well-Being, Outward Looking, Future Orientation, Technical Credibility.</i></p> <p>Take personal responsibility for own development, setting challenging development goals.</p> <p>Actively seek and take advantage of a wide range of learning opportunities, as available.</p> <p>Seek feedback on own performance, accepting constructive criticism without becoming defensive.</p> <p>Acknowledge mistakes, and learn from them, so that they are not repeated.</p> <p>Address areas of personal effectiveness that have been identified through feedback, demonstrating personal awareness of behaviours and attitudes.</p> <p>Reinforce Inland Revenue's values through leading by example in actions and words.</p> <p>Act with integrity at all times. Adopt a positive approach to change and be prepared to develop and try new ways of doing things.</p> <p>Keep up to date with technology and business tools relevant to the role.</p> <p>Maintain an appropriate level of e-literacy, including the ability to use a PC and common applications. Maintain a current knowledge of practices, trends and important information relevant to own area of work, both from within Inland Revenue and wider a field.</p> <p>Follow and support work practices that promote personal wellness.</p>	<p><i>These Strategic Responsibility PI's support the following Leadership Expectations: Walk the Talk, Outward Looking, Future Orientation, Working with the Treaty of Waitangi.</i></p> <p>Understand the implications, for yourself and your role, of the strategic direction of Inland Revenue.</p> <p>Maintain a current understanding of Inland Revenue's relationship to other government agencies, the Public Sector, and our wider community.</p> <p>Approach change in a way that supports the strategic needs of the organisation and encourages others to do likewise.</p> <p>Take responsibility for upholding Inland Revenue's policies and legislative responsibilities.</p> <p>Increase own understanding of Treaty of Waitangi issues that affect Inland Revenue responsibilities. Take on board and support Inland Revenue's developing approach to Treaty responsibilities.</p>	<p><i>These Management PI's support the following Leadership Expectations: Walk the Talk, Courage, Raising the Bar, Achieve Outcomes, Well-Being, Technical Credibility.</i></p> <p>Consider cost implications (financial and opportunity) and efficiencies when making decisions and managing resources.</p> <p>Provide timely, honest and constructive feedback to others, both formally and informally.</p> <p>Manage time and other resources efficiently achieving best-cost effectiveness.</p> <p>Model and actively support diversity behaviours and initiatives. Work co-operatively with others to ensure common goals are achieved.</p> <p>Take personal responsibility for own work and make own decisions.</p> <p>Challenge unacceptable behaviour.</p> <p>Contribute to creating a motivated environment where goals can be achieved.</p>
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Principal Work Groups within Assistance

The Customer Service Specialist position functions within the various business units of Assistance. These business units are responsible for the operational delivery of services, assistance and education to Inland Revenues external customers.

Families: The Assistance Families programme is a bundle of programmes for which Assistance is specifically responsible for. They include:

- Child Support
- Working for Families Tax Credits
- Paid Parental Leave

Child Support: Child support's core business is to assess, collect and disburse payments from parents who no longer live with their children, to help financially support those children.

Student Loans: Inland Revenue is responsible for maintaining the loan accounts after the end of each study year including the assessment and collection of loan repayments. This is achieved through:

- Assisting customers (borrowers) to understand and comply with their Student Loan obligations by managing customer contacts through all delivery channels
- Working with other agencies involved with the administration of student loans to provide as far as possible a seamless customer service.

Contact Centres: Contact Centres are responsible for delivering service across all channels but with a primary focus on inbound and outbound voice contacts.

Large Enterprises: Large Enterprises provides tailored services and compliance activities to:

- Organisations with an annual turnover of over \$100 million
- High Wealth Individuals
- Public sector and local bodies
- Non Resident Contractors
- Non Resident Entertainers
- Screen Production Industry

This team's structure is based on industry types to provide an enhanced level of service with a comprehensive knowledge of Inland Revenues Large Enterprise customers.

Individuals/Receivables:

Individuals: is primarily focussed on meeting the needs of customers whose income is taxed at source (Salary and Wage earners). The programme of work includes managing channels, supporting design work around PTS, IR3 and Rebate claims.

Receivables: primary function is to collect outstanding tax debt and overdue returns from a wide range of customers. This involves both reactive and proactive contact with customers. Receivables Assistance links closely with National Collection Enforcement Assurance to provide 'end to end' coverage of the debt book.

SME: Small to Medium Enterprises provides tailored services and compliance activities to any business entity whose turnover is less than \$100 million and registered for 1 or more of the following revenue types – Pay As You Earn (PAYE), Goods and Services Tax (GST), Fringe Benefit Tax (FBT) or Income Tax. Our role is to:

- Work together with subject matter experts to meet their obligations
- Tailor our interactions, reflecting an understanding and respect for the individuals circumstances
- Ensure the right information is provided to each other, at the right time and in the correct format