**FPC Project: Role Profile**

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| Role Title | **Retention Adviser - TBC** |
| Department & Directorate | Membership - Member Relations |
| Job Family Level | TBC |
| Reports to (Job Title) | Retention Lead |
| Direct Reports (Job Title) | None |
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| **Summary** – purpose of the role | |
| *Describe as concisely as possible the overall purpose of the job and including the core duties/responsibilities required to be performed in the role (eg, to provide a full range of administrative support services to the department including x,y,z)* | |
| The overall responsibility of the Retention Adviser is to engage, and where possible, upsell with members who have joined the Union, are ongoing members, or retain those members who have recently cancelled their membership. Through outbound calls and emails, the Retention Adviser will address member concerns and highlight the benefits of continued membership. The primary objective is to retain members by delivering exceptional customer service, building rapport, and offering tailored solutions that meet their needs.  This role is ideal for individuals with a strong background in customer service, a passion for member advocacy, and a commitment to supporting healthcare professionals.  **Key Responsibilities:**   * Conduct outbound calls or send emails to members who have cancelled their membership, either intentionally or unintentionally, to understand their reasons and address any concerns, aiming to retain them as members. * Make outbound calls or send emails to members for various purposes, including re-engaging lapsed members, completing applications, welcome calls, and other campaigns to engage with members. * Use persuasive communication techniques to promote the benefits of continued membership and provide tailored solutions to encourage member retention. * Accurately record all interactions and outcomes in the membership database, ensuring data integrity and compliance with GDPR and other relevant regulations. * Collaborate with the wider membership department to develop and implement retention strategies and share insights on common reasons for cancellations. * Stay informed about the organisation’s services, benefits, and current campaigns to provide members with up-to-date and accurate information. * Meet and exceed individual retention targets and key performance indicators (KPIs) set by the Growth Marketing Manager. * Participate in regular training sessions to continuously improve communication and negotiation skills, product knowledge, and understanding of the healthcare sector. * Provide feedback to the Retention Team Leader on common trends and member concerns to help shape future retention strategies and improve member satisfaction. | |
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| **Skill** (level and breadth of application) | |
| *What relevant experience is necessary to undertake this role? What specialist, technical or professional qualifications are required to be able to perform the job?*  *How far does the role extend out across the organisation, eg confined to own team, involves co-ordination with another department or requires regular negotiation with many other parts of the organisation. Why is this necessary? Describe the range of issues that are involved in this, eg resolving people’s IT problems, collecting information on key research items or*  *advising members on a particular issue.* | |
| * **Communication Skills**: Exceptional verbal communication abilities, enabling the building of rapport, active listening, and the clear and persuasive conveyance of information that provides a platform for member decisions. * **Persuasion and Negotiation**: Strong persuasive skills to effectively encourage members to retain their membership, coupled with the ability to handle objections confidently and calmly. * **Customer Service Orientation**: A genuine passion for assisting people, with experience in customer-facing roles and a focus on delivering high-quality service. * **Empathy and Understanding**: The ability to empathise with members’ concerns and needs, demonstrating patience, understanding, and a willingness to resolve issues. * **Problem-Solving**: A proactive approach to problem-solving, with the ability to think creatively and make quick decisions to offer solutions that meet both member needs and organisational objectives. * **Attention to Detail**: Strong organisational skills with meticulous attention to detail for accurate record-keeping and data entry. * **IT Proficiency**: Proficient in using CRM software, Microsoft Office Suite, and other relevant tools to manage member data and track retention efforts. * **Team Collaboration**: The ability to work effectively as part of a team, contributing to collective goals while also achieving individual targets. | |
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| **Intellectual Demands** (complexity & challenge) | |
| *What sorts of problems, situations or issues are typically dealt with? Give any illustrative examples. How are the problems, situations or issues dealt with (eg undertaking original research and analysis or seeking specialist advice)?*  *To what extent are standard procedures and processes followed when undertaking typical tasks, and how is personal initiative used when solving problems? To what extent is creativity used in solving the problems (eg adopting different approaches, trying things that have not been done before within the organisation or improving/changing previous approaches).* | |
| * **Knowledge of Healthcare Sector**: An understanding of the healthcare industry, trade union principles, and membership benefits is essential to effectively convey value to members. * **Analytical Skills**: The ability to swiftly analyse member feedback, identify patterns or trends, and apply critical thinking to develop appropriate retention strategies. * **Judgment and Empathy**: Regularly exercise judgment to determine the best approach for each unique member interaction, balancing empathy with the objective of retention. | |
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| **Judgement (independence and level and impact limitations)** | |
| *What are the typical decisions that are made in the job without reference to any higher authority? What informs/constrains the decisions (eg expenditure limits, have to follow clearly laid down procedures or working within broad objectives). What influence upon policy, procedures or resources is there (eg giving advice to others)?*  *Who (or what) is next to be affected by the decisions that are made – for example, supervisor sees them before they leave the team or the whole department sees and has to respond to the change that is made. Give typical example(s) of the consequences of the decisions (eg what impact does the decision-making have on the performance of the team / section / department / organisation)?* | |
| * **Decision-Making Skills**: Capable of making sound decisions during member interactions, including knowing when to escalate issues to a supervisor or offer alternative solutions. * **Empathy and Assertiveness**: Able to gauge the appropriate level of empathy and assertiveness for each call, based on the member’s concerns and reasons for cancellation. * **Data Protection**: Responsible for safeguarding sensitive member information, ensuring compliance with data protection policies. | |
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| **Use of Resources** (supervision of resources and influence) | |
| *What responsibility is there for managing people, equipment, budgets, resources, customer’s welfare or confidential information? If this is a staff management role describe what is involved, eg staff reporting, staff development, appraisal, leading a department or the allocation of work.*  *How does the role fit within the organisation, eg support role, team member, team leader, specialist policy adviser, or leading major areas of core business?* | |
| * **CRM and Database Management**: Use the organisation’s CRM system and membership database to efficiently track member interactions, document outcomes, and manage call schedules. * **Continuous Improvement**: Utilise training resources and feedback to consistently enhance communication skills and product knowledge.   **Team Collaboration**: Work with colleagues and leverage team resources to share insights and best practices for boosting retention rates. | |
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| **Communication** (level, internal and external demands and significance) | |
| *What people are typically contacted (regardless of the medium) inside the Association, eg immediate colleagues, senior managers or administrators? Committee members are the only members classed as internal communication. Normal non committee membership and doctors are external (see below)*  *Who is in regularly contact with the role holder outside of the Association, eg members who are not committee members, suppliers, members of the public? Approximately what percentage of the time is spent on external communications?*  *What is the purpose of these contacts, eg conveying information, gathering data?* | |
| * Communicates regularly with members through outbound calls, maintaining a professional and empathetic tone. * Engages with internal stakeholders, including the Retention Team Leader and other departments, to provide feedback on member concerns and suggest improvements. | |
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| **Physical Demands & Coordination** (physical effort and mental strain) | |
| *Are there any unusual physical or mental demands of the role; for example, lifting heavy objects, standing for long periods, using VDUs extensively or high levels of concentration?* | |
| * There will be normal physical demands typically associated with an office or home-working environment and there will be limited requirement to engage in lifting/carrying or other exertion. * There will be a requirement to use office technology and systems as provided or recommended by the BMA. * The role holder will not be required to regularly travel in order to carry out the role,. Attendance at meetings at a variety of locations may be required in line with Member Relations & BMA policy. * Extensive use of VDU’s will be required, together with frequent periods of high concentration whilst analysing/manipulating data and/or data processing/entry. * There are internal health & safety policies and guidance to be followed and adhered by the role holder as would be reasonably expected of any employee. These policies apply both in the normal office environment, home office, and also when visiting other locations in the execution of duties. | |
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| **Working Conditions & Emotional Demands** | |
| *What are the environmental conditions in which the work is conducted, the social and emotional demands faced by the role and the pressures resulting from these?* | |
| * The job is typically conducted either in a normal office or home office environment or for visits or meetings at external location as required to carry out the role and is not considered to be exposed to hazardous conditions or extreme anti-social behaviour (which should be reported through the appropriate internal channels). * The post holder will have frequent contact with members and due to the nature of subjects discussed, could be exposed to anti-social behaviour and/or verbal abuse * The role is results based and orientated to meet wider membership goals for the BMA | |
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| **Values & Behaviours** | |
| The post-holder is expected to execute their role in line with our five organisational values.  These are currently being translated into behavioural indicators that will form part of our new performance management process.  The following examples illustrate how we are using our values to inform how we act:  We are leaders because:  – We strive to always improve  – We take responsibility for our actions  – We collaborate with each other and work as one BMA for the good of our members  – We are proactive and prepared to guide our members and each other  We are experts because:  – We understand our members  – We draw on our collective experience and knowledge to solve problems  – We use our insights and research to make decisions  – We provide accurate, credible, relevant and engaging information  – We recognise our strengths and act upon them  We are committed because:  – We listen to our members and put them at the heart of everything we do  – We are respectful, inclusive, open and honest with our members and each other  – We approach everything we do with confidence and sensitivity  We are reliable because:  – We deliver on what we say we will do  – We are accessible and approachable  – We build trust by being consistent and supportive  – We are positive and decisive whatever the situation  We are challenging because:  – We fight, ethically and fearlessly, for the interests of all our members  – We work as a brave, assertive and effective champion for high quality health services and the advancement of the profession. | |
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