

The Education People

Job Description: Customer Support Officer



Section: Schools Financial Services
Location: Maidstone
Grade: KR8
Responsible to: Senior Core Delivery Officer

Purpose of the Job:

To provide advice, support and guidance to all customers including helpdesk cover. To deliver and assist in the maintenance of information and guidance for Schools Financial Services customers and staff.

To support and administer information systems and software operated by Schools Financial Services and its customers to ensure consistency.

To support the requirements of the marketing strategy.

Main duties and responsibilities:

1. Act as the focal point for enquires giving high quality advice and information to all customers acting as the first point of contact (helpdesk) for all incoming enquiries.
2. Maintain and cascade, as appropriate, the information and guidance available to Schools Financial Services customers and staff.
3. Deliver and support a small number of contracts as defined in the relevant contract specification documentation and agreed with schools, academies and MAT's. This will include providing support and sound financial management advice to schools on budget preparation, monthly monitoring and closure of accounts.
4. Support the operation of all information systems and software for Schools Financial Services ensuring consistency.
5. Maintain and reconcile the records for invoicing customers.
6. Be responsible for the maintenance and reconciliation of the School's balances on the Local Authority holding accounts.

7. Be responsible for the maintenance and reconciliation of school's VAT claims, ensuring school's VAT is claimed appropriately and reimbursed to schools in the given timescales.
8. Assist with the installation of new applications and support and customise existing applications to preserve longevity and ensure SFS continue to meet business needs.
9. Promote Schools Financial Services products to increase income in accordance with the marketing strategy.
10. Support the delivery of all business requirements of Schools Financial Services.

Footnote: This job description is provided to assist the job holder to know what his/her main duties are. It may be amended from time to time without change to the level of responsibility appropriate to the grade of post.

The Education People
Person Specification
 Schools Financial Services
 Customer Support Officer KR8



The following outlines the criteria for this post. Applicants who have a disability and who meet the criteria will be shortlisted.

Applicants should describe in their application how they meet these criteria.

Qualifications	Financial qualification or ability to do the job
Experience	Experience of working within a finance environment
Skills and Abilities	Ability to work on own and as part of a team
	Good customer relationship skills
	Good IT skills
	Good written and verbal communication skills
	Good organisational skills
	Ability to maintain confidentiality
	Research, analytical and interpretive skills
	Fluent in English
Knowledge	A good understanding of national and local policies, financial controls and procedures Knowledge of school finance systems.

Company Values and Expectations

The Education People we are guided by our shared values:

- **Moral Purpose:** We are driven by our shared moral purpose to do all that we can, both directly and indirectly, to improve educational outcomes and life chances.
- **People First:** We are committed to always putting people first: our staff, clients and partners, and above all, the people we serve.
- **Stronger Together:** We believe in the power of partnership and collaboration, understanding that the very best outcomes are delivered only when we embrace challenge and work together – with each other, our clients and partners.
- **Excellence:** We strive to excel in the delivery of high-quality services that produce lasting outcomes: balancing pace, precision, practicality and cost.
- **Spirit of Innovation:** We have a restless curiosity; we embrace every opportunity to learn, to challenge the status quo, and to seek to set new standards for outcomes and delivery.
- **Integrity:** We expect the highest standards of professionalism and integrity of ourselves and others, acting at all times within the ethical framework of our values.