

## JOB DESCRIPTION

# Administrative Assistant For Client Management

## Introduction

This is a full time, office based role for a national independent Occupational Therapy Practice, within the centre of Hook, Hampshire. It requires an individual with an interest in people and strong communication and organisational skills. Although a background in occupational therapy would be an advantage, it is not essential for this role. This is a fantastic opportunity to experience the business side of private occupational therapy.

The Client Manager Administrative Assistant (CMA) will have the opportunity to work alongside experienced OT's who have an excellent knowledge of both statutory and private occupational therapy. This role is being implemented due to continued growth and as a result there will be the genuine opportunity to develop this role, whilst gaining a valuable insight into many aspects of private practice.

The primary goal of the CMA is to provide administrative support to the Client Managers. Your main area of responsibility will be to ensure you are familiar with all active cases, including the relevant therapists, referrers and clients. You will be expected to liaise with and develop strong working relationships with our associate therapists as well as our referrers and clients.

As an externally facing representative you will need to uphold the high standards The OT Practice clients expect of us. The temperament of the person in the role is also very important. At The OT Practice we pride ourselves on being friendly and caring, but professional. As this role requires dealing with people externally it is vital they are able to portray that message to our therapists and clients.

## Applications & enquiries

Applicants should submit a CV and covering letter to [wendy@theotpractice.co.uk](mailto:wendy@theotpractice.co.uk) or if you would like to discuss the role in more detail please call Wendy on 0330 024 9910

## Our Company ethos

- We make clients & potential clients feel understood and provide sound professional advice – even if it ends up being for free
- We are friendly & caring, but always remain professional
- We are socially responsible – if there is a better option for a prospective client then we say so
- We are a private practice and understand that generally our clients are looking for more than what statutory services provide and are willing to pay for that service
- We are driven and go the extra mile if that is what is needed to convert an enquiry or to keep a client happy.

## Details of the role

The overall aim of the Client Manager Administrative Assistant (CMA) will be to ensure the smooth running and timeliness of all Client Manager led cases. The successful candidate will be responsible for the following core tasks:

- Case administration tasks liaising with our therapists:
  - Following up assessments that have not been booked in.
  - Following up work offers that have not been accepted/declined.
  - Ensuring assessment reports are completed on time.
  - Analysing assessment reports and liaising with therapists to schedule treatment programmes.
  - Scheduling monthly progress reports for therapists.
  - Assisting Client Managers with getting in all month end reports and invoices.
- Case administration tasks liaising with our clients and referrer:
  - Following up treatment quotes that have not been accepted/declined.
  - Taking calls and enquiries relating to existing cases when the Client Manager for that case is unavailable and assisting where possible.
- Working with the Client Managers:
  - Although the CMA will be working closely with the Client Managers, they will work autonomously without being overly reliant on the Client Managers.
- Reporting
  - Each day the CMA will report back (by email) to each Client Manager any specific actions or warning of potential problems that requires their attention or that they should be made aware of.
  - Each week in the clinical meeting they will be expected to report back headline numbers and highlight any significant issues with cases.
- Contribute ideas and suggestions for how we can improve our processes and service in general to our clients.

## Skills and qualifications

The following skills and qualifications will be required/desirable:

- Highly competent with computers and online technology (tech savvy).
- Excellent written and verbal communication skills (phone manner is very important).
- Exceptional organisation skills and ability to multi-task, ideally with some experience of project management (formal or informal project management).
- A background or an interest in occupational therapy.
- Willing to undertake a DBS check.

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## Personal skills & attributes

Fundamental to this role is the character and temperament of the individual. They will be expected to be highly organised, efficient and have a strong sense of responsibility. Important personal skills and attributes include:

- Caring, friendly and always willing to listen.
- Taking responsibility and having the ability & confidence to make good decisions.
- Problem solver and determined.
- Ability to work independently and within a team environment.
- Act on own initiative, self motivated and tenacious.
- Exceptionally well organised and able to put their own strategies and processes in place to maintain a well organised working environment.
- Be able to earn respect and in turn have authority within the team and therapist network due to excellent knowledge of cases and organisation.
- Outstanding attention to detail.
- Personal pride in their work.
- Desire to progress and develop their professional career.
- Efficient working style and ability to juggle tasks without missing things.
- Excellent telephone manner – chatty and confident but always professional.
- Able to remain calm, composed and professional under stressful or confrontational situations.

## What we offer you

We pride ourselves on being a caring and friendly, but professional company. We believe the growth of our business to date is directly attributed to ensuring our values are at the core of everything we do. Based in the centre of Hook, with free parking and excellent transport links. Offering a competitive salary depending on experience, with 25 days holiday, plus bank holidays and other company benefits.

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## Person Specification:-

| <b>CRITERIA</b>                        | <b>ESSENTIAL</b>   | <b>DESIRABLE</b>  |
|--|--|---|
| <b>QUALIFICATIONS</b>                  | <ul style="list-style-type: none"> <li>• Good standard of literacy and numeracy (at least GCSE Level C or Equivalent)</li> <li>• IT literate</li> </ul>  | <ul style="list-style-type: none"> <li>• Degree or equivalent experience</li> <li>• Word Processing Qualification</li> </ul>  |
| <b>EXPERIENCE</b>                      | <ul style="list-style-type: none"> <li>• Experience of working on own initiative</li> <li>• Experience of dealing with diverse groups of people at all levels</li> <li>• Proven administrative skills such as filing, constructing documents, data entry, monthly reports, data collation</li> </ul>   | <ul style="list-style-type: none"> <li>• Experience of working in a similar administrative role</li> <li>• Previous experience of supporting senior colleagues</li> </ul>   |
| <b>SKILLS, ABILITIES AND KNOWLEDGE</b> | <ul style="list-style-type: none"> <li>• Excellent working knowledge of Microsoft Word, Excel and Outlook</li> <li>• Strong organisational skills</li> <li>• Ability to prioritise own workload and meet deadlines</li> <li>• Work accurately with excellent attention to detail</li> <li>• Understand the importance of confidentiality, data protection and security</li> <li>• Ability to develop effective administration and support systems</li> <li>• Effective influencing skills</li> <li>• Excellent written and verbal communication skills</li> <li>• Excellent telephone manner</li> <li>• Is courteous and effective when dealing with people, exchanges information in a tactful and diplomatic manner, able to communicate effectively at all levels.</li> </ul> | <ul style="list-style-type: none"> <li>• Ability to work unsupervised and use initiative</li> <li>• Experience of working with sensitive information and maintaining its security</li> <li>• Ability to solve a range of problems by responding to varying circumstances, whilst working within company policy and procedure</li> <li>• Some experience of project management (formal or informal management)</li> <li>• Is client focused ensuring that the needs of our clients are maintained and managed appropriately</li> </ul> |
| <b>PERSONAL ATTRIBUTES</b>             | <ul style="list-style-type: none"> <li>• Positive 'can do' attitude</li> <li>• Self-motivated, flexible and enthusiastic approach to work</li> <li>• Ability to work in a confidential and professional manner</li> <li>• Ability to recognise when issues need to be passed to a senior colleague</li> <li>• Strong interpersonal skills</li> <li>• Enjoy working with people with good team working skills</li> <li>• Ability to establish and maintain strong working relationships at all levels</li> <li>• Willingness to learn new skills</li> <li>• Well presented</li> </ul>   | <ul style="list-style-type: none"> <li>• Demonstrable interest in Occupational Therapy</li> <li>• Ability to use tact and diplomacy as necessary</li> </ul>   |

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