

Job profile



Job title:	Professional Services Advisor	Reports to:	Professional Services Operational Manager - Jo Hanswenzl
Operating company:	Denplan	Location:	Winchester

Date:	January 2011	Grade/job units:	6	Job code (if applicable):	
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Job purpose:

The Professional Services Advisor is responsible for learning and working effectively in the following areas, as directed by the management team:

Key accountabilities:

1. Clinical Mediation

- Mediating clinical complaint cases
 - Liaising with relevant parties internally and externally
 - Maintaining regular, clear and concise communication with all relevant parties
 - Gathering and copying clinical information and gaining relevant consent
 - Identifying and communicating potential risks
 - Progress chasing
 - Maintaining databases
 - Working within budget
 - Sending patient and dentists feedback questionnaires in all cases
- OUTCOME – to ensure that clinical mediation cases are resolved in a timely and cost effective manner to the satisfaction of all parties wherever possible

2. Goodwill Transfer Service and Cancellation

- Co-ordinating the goodwill transfer of patients from one goodwill owning dentist to another, providing guidance on options of transferring patients
- Co-ordinating the cancellation of Denplan patient contracts when appropriate and identifying and implementing patient retention opportunities through consultant and/or alternative Denplan

Measures:

1. Clinical Mediation

- Feedback questionnaires and ad hoc customer feedback
- Feedback from internal customers
- Performance statistics (telephone statistics, post statistics, workloads, turnaround times)
- Audits
- Call coaching results
- Reports – Dashboard, SOFT, MD and performance statistics

2. Goodwill Transfer Service and Cancellation

- Feedback questionnaires and customer feedback
- Performance statistics (telephone statistics, post statistics, workloads, turnaround times)
- Reports – dashboard, SOFT, MD and performance statistics
- Audits
- Call coaching results

products, providing guidance on options of cancelling patients

- Providing extensive risk management advice, both verbal and written, in all cases
- Liaising with all relevant parties – vendor, purchaser, solicitors, business managers/Cluster managers for corporate bodies and Limited companies, etc.
- Issuing feedback questionnaires to all vendors and purchasers
- Adhering to and working within specified time constraints
- Maintaining databases
- Ensuring relevant customers and colleagues are regularly updated (both internal & external)
- Ensuring completion of relevant paperwork and progress chasing when necessary, being assertive with timescales & requests

OUTCOME – to ensure the smooth re registration of patients from one goodwill owning dentist to another to maximise patient retention. Also, on occasions, the accurate and timely cancellation of Denplan patients contracts. To minimise number of GTS cases that result in Risk cases.

3. Risk

- Identifying, monitoring and handling potential and current risks to the business/patients
- Reporting to relevant parties at appropriate times
- Effective liaison with risk team, dentists, defence organisations, solicitors and other relevant parties
- Ensuring agreed actions from Risk management meetings are implemented
- Resolving clinical mediation cases relating to risk cases
- Maintaining databases
- Undertaking administrative tasks associated with risk cases

OUTCOME – to ensure minimal financial and reputational risk to the business

3. Risk

- Reports
- Feedback from risk team
- Database
- Audits
- Risk case levels
- Number of risk cases
- Call coaching results

4. Criminal Records Disclosure Service

- Provide appropriate advice, forms and administrative support

5. Denplan Quality Programme

- Working closely with Denplan Practices and the Practice Advisor Team to book all types of practice assessments, maintaining effective diary management
- Processing, administering and chasing all assessment types
- Dealing effectively with all legislative and professional queries
- Identifying and communicating potential risk
- Excel Patient Survey
- Processing Advisor expenses
- Promoting benefits of Excel accreditation
- Managing the Excel accreditation process and payment collection from application through to accreditation and, when necessary, de-accreditation

OUTCOME – To ensure all Denplan practices receive effective support and guidance in respect of legislative and professional best practice

6. Denplan Training

- Booking training courses
- Preparation for Excel Training Programmes (ETPs)
- Organising and preparation for Tailor Made courses and Training Events, including promotional mailings as appropriate
- All post-course follow up work
- Managing the Excel accreditation process from application through to accreditation
- Attendance at Training Events, including set-up of all stands and all necessary presentation equipment, hosting and meeting delegates
- Booking accommodation for Sales Trainers and guest speakers
- Arranging flights
- Co-ordinating guest speakers to deliver at Training Events

4. Criminal Records Disclosure Service

- Feedback from service users, colleagues, management and Career Check

5. Denplan Quality Programme

- Feedback from practices, Practice Advisors and internal customers
- Performance statistics (telephone statistics, post statistics, productivity, turnaround times)
- Audits and database maintenance
- Reports – Dashboard, SOFT, MD and performance statistics
- Excel accreditation statistics
- Timely delivery and closure of assessments
- Call coaching results

6. Denplan Training

- Feedback questionnaires
- Performance statistics (telephone statistics, post statistics, productivity, turnaround times)
- Audits and database maintenance
- Call coaching results
- Reports – Dashboard, SOFT, MD & performance statistics
- Clinical Audit tracking
- Feedback from Field Trainers/internal customers

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- Processing payments and liaising effectively with our Finance Department
- OUTCOME – Effective delivery of all Denplan Training courses, maximising attendance levels and income
- 7. General**
- Treating customers and colleagues fairly
 - Handling clinical and legislative queries
 - Completion of PARIS sheets as required by Practice Advisor
 - Timely PDP follow up and closure
 - Logging, scanning and copying post
 - Maintaining relevant databases (Sales Support, Pivotal, Oscar, Respond)
 - Carrying out sensitive issues and new member status checks
 - Contribution to and maintenance of departmental intranet and internet sites
 - Testing IT systems
 - Stock control
 - Production and revision of departmental SOPs
 - Maintaining tidy workstation, office and stockroom
 - Adhering to data protection policy
 - Adhering to company Credit Card and Direct Debit Handling Policy
- OUTCOME – A confident, flexible and agile team with a good all-round understanding and appreciation of the business
- 8. Self Development**
- Working on your own initiative when appropriate
 - Taking an active role in your personal development, career development and training
 - Working closely with management team to maximise own potential
- OUTCOME – To achieve a streamlined, focused, proactive and continually improving team.

- 7. General**
- TCF log and 5th Denplan bonusable objective
 - Feedback from colleagues, dentists and dental teams
 - PARIS sheet statistics and Practice Advisor Feedback
 - PDP statistics
 - Performance statistics
 - Results of audits and call coaching
 - Intranet review
 - Feedback from IT
 - Effective stock management
 - Up-to-date standard operating procedures
 - Clean, tidy working environment
 - Full compliance with data protection policy
 - Full compliance with company Credit Card Handling Policy
 - Feedback from colleagues and management team
- 8. Self Development**
- Performance review
 - Personal Development Plans
 - Updates with management team
 - Performance statistics (telephone statistics, post statistics, productivity, turnaround times)
 - Feedback from colleagues and management team
 - Attendance at Training Events, practice assessments and Advisor Conferences

9. Communication

- Ensuring all communications, both written and verbal, are clear, concise, timely, relevant and appropriate
- Writing and developing overviews and presenting to internal and external parties
- Maintaining departmental dashboards
- Completing reports as requested by management team (MD reports, SOFT reports, Respond reports for Sales Trainers, schedules, agendas and minute-taking)
- Liaising with Press Office regarding articles for Update Magazine
- Liaising with Marketing Department to produce new literature and make amendments to existing literature
- Support and advice to dental practices
- Ensuring all non-standard communication complies with sign off procedures

OUTCOME – to raise the profile of the division, increase understanding of its various functions and continually improve working relationships

10. Promotional Activities

- Promotion of all Denplan products and services, in particular:
 - Excel
 - Stairway Programme
 - Quality Programme and Online Practice Manuals, Protocols and Policies
 - Training Events, Tailor-made training days and CPD Essentials Days
 - On-line resources
 - Website
 - Goodwill Transfer service
 - Clinical Mediation service

OUTCOME – effective promotion of Denplan products and retention of Denplan dentists and patients

9. Communication

- Feedback
- Updates with management team

10. Promotional Activities

- Retention report
- Excel statistics
- Online Manual usage
- Training Days and delegate numbers
- Sales of online products
- Increase usage and advance notice of goodwill transfers
- Feedback on clinical mediation service

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<p>11. Additional Tasks</p> <ul style="list-style-type: none"> • Appreciation and understanding of AXA, Denplan and divisional business plan • Highlighting potential areas for improvement and suggesting and implementing solutions • Identifying and acting upon opportunities and potential risk issues • Completing additional tasks as requested by the management team • Ensuring excellent standards of customer service • Working across the division, subject to resource requirements • Providing telephone cover for other teams within the business <p>OUTCOME – To create a team with a flexible attitude to work and a strong customer focus.</p>	<p>11. Additional Tasks</p> <ul style="list-style-type: none"> • Updates with management team • Performance statistics (telephone statistics, post statistics, productivity, turnaround times) • Reports – dashboard, SOFT, MD & performance statistics • Feedback from customers or colleagues • Compliance with Data Protection Act • Green Team
<p>Dimensions impacted by job</p>	<p>Skills and experience:</p>
<p>Professional Services Advisors work in any area of the division, as directed by the management team</p>	<ul style="list-style-type: none"> • Negotiation skills • Mediation skills • Decision making • Problem Solving • Organisational Skills • Time Management • Communication – written and verbal • Flexibility and adaptability • Teamwork • IT literacy – Basis Microsoft Office • Rapport Building • Attention to detail • Impartiality • Identifying opportunities
<p>Direct reports' job titles:</p>	<p>Key interfaces (internal and external):</p>

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N/A	<ul style="list-style-type: none">• Professional Services Team• Dental Advisors• Member dentists and their staff• Customer Advisors• Practice Support Advisors• Sales Trainers and external trainers• Sales Consultants/ Area Managers• Events Team• Marketing• Finance• IT• Defence Unions• Dental Complaints Service• Corporate Bodies• Solicitors
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The operating environment and context of the job:

- Denplan is the UK's leading provider in plans for private dentistry. These plans enable patients to budget for ongoing dental maintenance, routine, preventive and cosmetic dentistry. Many of these plans benefit from supplementary insurance cover.
 - The Professional Services division supports the core business of Denplan by providing professional support to member dentists and their staff.
 - The Professional Services Division incorporates six areas
 - Clinical mediation – informally mediating on clinical complaints between patient, dentist and other organisations
 - Risk Management – the ongoing monitoring and management of dentists who may pose a risk to the business
 - Goodwill Transfer Service and block cancellations – the re registration of patients from one goodwill owning dentist to another and the cancellation of Denplan patients en masse from a goodwill owning dentist
 - Denplan's Quality Programme – ensures all our member dentists meet the required standards
 - CRB checking service – working with external organisation to provide CRB checks for Denplan practice staff
 - Denplan Training, which includes the Denplan Stairway Programme– provides training for member dentists and their practice teams
- The Professional Services Advisors work across any function within the division, as directed by the management team. They will therefore need to maintain a flexible approach and have the ability to multi task whilst maintaining high standards of accuracy and customer service.

FSA/legal requirements (NB only applicable to approved persons):

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Approved by HR director:	Name:	Signature:	Date:
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Approved by job holder:	Name:	Signature:	Date:
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[Org Chart](#)