


Profile Title:	Membership and Income Officer	
Responsible To:	Customer Experience & Membership Manager	
Responsible For:	N/A	
Post Reference:	N/A	

**Vision and Values**

*“Inspiring people to live active healthy lives”*

- *We are always improving*
  - *We care*
- *We make a positive difference*
- *We are customer focused*
  - *We are one team*

**Purpose of Post:**

To achieve our vision of “Inspiring people to lead active, healthy lives,” we are committed to delivering an outstanding, customer-focused experience that motivates members and users to stay active and healthy.

The Membership and Income Officer plays a key role in this mission by providing high-quality administration and support services for memberships. This includes ensuring that memberships are effectively managed through accurate CRM administration, overseeing collections, managing rejections, managing debt, and processing cancellations.

The role is also responsible for maintaining robust systems that comply with internal and external requirements, while building positive relationships with customers throughout their membership journey. This involves processing applications professionally, supporting members who may face financial challenges, and proactively seeking opportunities to retain membership.

By combining excellent customer service with strong financial management, the Membership and Income Officer directly contributes to the financial stability and long-term success of the organisation.

**Responsibilities:**

**Team & Business Support**

- Support the Business Development Team in delivering projects and achieving team objectives.
- Collaborate with colleagues to ensure the right information reaches the right people at the right time, providing a first-class, customer-focused service.
- Communicate effectively with internal teams across the business to ensure consistent, high-quality services and products for customers.
- Collaborate with your Manager to drive continuous improvement, sharing knowledge and ideas to better meet customer needs.

**Membership Administration**

- Own and manage the membership process for all membership types from start to finish, including:
  - Processing applications and issuing membership materials/communications.
  - Maintaining accurate CRM records.
  - Managing suspended memberships, referrals, and cancellations.
  - Ensuring sufficient stock of required resources.
- Manage and maintain the membership database, consulting with the system provider and IT to ensure the CRM remains fit for purpose and contributing to improvements.

### **Income & Financial Processes**

- Oversee membership income processes, including:
  - Producing dishonour and rejection reports, taking appropriate action to recover arrears and manage debt.
  - Assist with administering Direct Debit collections, BACS payments, and issuing related correspondence.
  - Producing and maintaining financial reports (income, expirations, corporates, referrals, debtors).
  - Ensuring accurate records and archives (electronic and hard copy) are maintained.
- Collaborate closely with the Customer Experience and Membership Manager to optimise CRM/Leisure Management System (LMS) usage and configuration for business efficiency.
- Support budget management, ensuring financial targets are met.

### **Customer Experience & Engagement**

- Maintain strong working relationships with site teams to ensure smooth communication around cancellations, amendments, and membership support.
- Manage customer enquiries, complaints, and feedback professionally in partnership with the Customer Contact Team, ensuring timely resolution.
- Proactively engage with members seeking to cancel, offering alternative options to encourage continued engagement.
- Produce KPI reports, analysing results and using insights to improve service delivery.
- Monitor member activity and contact customers who have not used our facilities for 21 days to prompt re-engagement and support retention targets.

### **Collaboration & Continuous Improvement**

- Work collaboratively with IT, finance, and other teams to deliver effective CRM and membership management functions.
- Support the review and development of company policies relevant to membership and customer service.
- Assist the Contact Centre and wider teams with complaints, queries, and operational support.
- Identify opportunities to enhance processes and improve the overall member experience.
- Participate in key business meetings to support company growth and service improvement.

### **Standards, Compliance & Leadership**

- Lead by example, maintaining high standards and acting to positively influence both customers and colleagues.
- Ensure compliance with OCL policies, procedures, and practices, including security, GDPR, financial accounting, and reconciliation processes.
- Build and maintain effective working relationships with internal and external stakeholders.
- Perform additional duties as required that are appropriate to the role.

<b>Criteria</b> <b>A: Essential</b> <b>D: Desirable</b>	<b>Method of Assessment</b> <b>A: Application</b> <b>I: Interview</b> <b>T: Task</b>	
Education and Training:	<b>Criteria</b>	<b>Method of Assessment</b>
• Degree in relevant qualification or as a minimum NVQ Level 3 or equivalent	D	A/I
• Customer Service Training/Qualifications	D	A/I
• CRM/LMS Training/Qualifications	D	A/I
• High standard of numeracy and literacy	A	A/I
Relevant Experience:	<b>Criteria</b>	<b>Method of Assessment</b>
• Previous experience in a similar role or in a Contact Centre environment	A	A/I
• Our ideal officer will have the key personable skills of caring, empathy,	A	A/I

<ul style="list-style-type: none"> <li>positivity, and drive.</li> <li>Experience of using CRM/LMS systems</li> <li>Experience of running Direct Debit payment collections</li> <li>Experience of managing debt</li> <li>Knowledge of Gladstone MRM</li> <li>Previous experience in the leisure industry</li> <li>Understanding and appreciation of the importance of excellence in customer service</li> <li>Good at problem solving and taking ownership.</li> <li>Good communicator with high level of spoken and written English</li> <li>Good listening skills, understanding our members and customers' requirements.</li> <li>Confident in making decisions that support our customers and our business.</li> <li>A team player that can work effectively as 'One Team' who can learn from colleagues but also share and develop our people</li> </ul>	<p>A</p> <p>D</p> <p>D</p> <p>D</p> <p>D</p> <p>A</p> <p>A</p> <p>A</p> <p>A</p> <p>A</p> <p>A</p>	<p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p>
<b>General and Special Knowledge:</b>	<b>Criteria</b>	<b>Method of Assessment</b>
<ul style="list-style-type: none"> <li>A sound understanding of the leisure industry.</li> <li>Understanding of the principles of how Leisure Trusts operate.</li> <li>Understanding of Direct Debit collection</li> <li>Understanding of CRM systems</li> <li>IT Systems. Including Plus 2 and MS Office</li> <li>Debt collection processes</li> <li>Data Protection</li> </ul>	<p>D</p> <p>D</p> <p>D</p> <p>A</p> <p>D</p> <p>D</p> <p>A</p>	<p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p>
<b>Skills and Abilities:</b>	<b>Criteria</b>	<b>Method of Assessment</b>
<ul style="list-style-type: none"> <li>Possess strong leadership, motivational and team building skills.</li> <li>Possess excellent numerical ability, including the capacity to present information and data in a way that is easy to understand.</li> <li>Have an excellent knowledge of CRM/LMS, Microsoft Office applications and management software systems.</li> <li>Possess strong written and verbal communication skills.</li> <li>Ability to prioritise workloads and plan effectively.</li> <li>Able to work with little or no supervision.</li> <li>Ability to speak to different people at different levels and be assertive.</li> <li>Managing difficult situations with understanding</li> <li>Problem solving</li> <li>Negotiation</li> <li>Data production and analysis</li> <li>IT system requirement planning</li> <li>Project management</li> <li>Decision making</li> </ul>	<p>D</p> <p>A</p> <p>A</p> <p>A</p> <p>A</p> <p>A</p> <p>A</p> <p>A</p> <p>A</p> <p>A</p> <p>A</p> <p>D</p> <p>A</p>	<p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p> <p>A/I</p>
<b>Additional Requirements:</b>	<b>Criteria</b>	<b>Method of Assessment</b>
<ul style="list-style-type: none"> <li>Willing to work flexibly in accordance with policies and procedures to meet the operational needs of the business.</li> <li>Willing to undertake training and continuous professional development in connection with the post.</li> <li>Have high personal standards, an eye for important detail, and lead by example.</li> </ul>	<p>A</p> <p>A</p> <p>A</p>	<p>A/I</p> <p>A/I</p> <p>A/I</p>