

JOB DESCRIPTION

Job Title:	Customer Planner
Reports to:	Planning Manager
Job Ref:	HRJ 012
Department:	Client Services
Location:	Tower Quays, Birkenhead

Role Overview:

The Customer Planner is responsible for coordinating customer appointments and supporting the efficient deployment of field-based Water Auditors, Engineers and Technicians. The role acts as the primary point of contact for customers, managing inbound and outbound communications, scheduling appointments, maintaining accurate records and ensuring the effective utilisation of operational resources.

Working within a fast-paced planning environment, the Customer Planner plays a key role in delivering a positive customer experience while supporting the successful delivery of operational programmes and contractual requirements.

MAIN DUTIES

1. CUSTOMER CONTACT MANAGEMENT

- Handle inbound customer enquiries professionally and efficiently via telephone and other communication channels.
- Make outbound calls to customers to arrange, confirm, amend or reschedule appointments.
- Provide clear and accurate information regarding services, appointments and programme requirements.
- Resolve routine customer enquiries at first point of contact wherever possible.
- Escalate customer complaints, concerns or operational issues in line with company procedures.
- Maintain a professional, courteous and customer-focused approach at all times.

2. PLANNING AND SCHEDULING

- Schedule appointments using company planning and workforce management systems.
- Coordinate diaries for field-based personnel to ensure optimum utilisation and coverage.
- Organise appointments geographically to maximise operational efficiency and minimise travel time.
- Manage appointment changes, cancellations and re-bookings.
- Ensure work schedules are communicated accurately and in a timely manner
- Support the delivery of performance targets relating to appointment attendance and operational efficiency.

3. ADMINISTRATION

- Maintain accurate customer, appointment and operational records.
- Update company databases and management systems with relevant information.
- Ensure all data is recorded in accordance with company policies and data protection requirements.
- Complete administrative tasks associated with appointment booking and service delivery.

KEY INTERFACES

Planning Team Leaders, Customer Planning Supervisor and Planning Manager as well as Project Managers, field based personnel and other Client Services.

SKILLS, EXPERIENCE AND QUALIFICATIONS

Essential

- Previous experience in a customer service, contact centre, scheduling or administrative role.
- Experience handling both inbound and outbound telephone calls.
- Excellent verbal communication and interpersonal skills.
- Strong organisational and prioritisation abilities.
- Good problem-solving and decision-making skills.
- Ability to work accurately in a fast-paced environment.
- Competent in Microsoft Office applications, including Outlook, Word and Excel.
- Experience using databases, scheduling systems or CRM platforms.

Desirable

- Experience of workforce planning or appointment scheduling.
- Experience supporting field-based operational teams.
- Experience within utilities, housing, property services, facilities management or related sectors.
- Knowledge of customer service performance measures including call quality, productivity and service levels.