

Digital Adviser Role Definition

Purpose of the role

To provide digital advice and information to members of the public accessing CAG services through the telephone and email platform.

Main duties and responsibilities.

- Assess clients problem(s) using sensitive listening and questioning skills, establishing what the client wants
- Identify key information about the problem including time limits, key dates and any requirement for urgent advice or action
- Assess and agree the appropriate level of service, taking into consideration the client's ability to take the next step themselves, the complexity of the problem and the bureau's resources.
- Refer clients appropriately (both internally and externally) to suit clients' needs following agreed protocols, including making arrangements and informing clients of what to expect.
- Signpost clients appropriately to suit their needs, following agreed protocols.
- Identify if there is any question of discrimination.
- Identify research and campaigns issues.
- Use IT for record keeping.
- Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy.

Personal skills and qualities that an adviser needs:

- A commitment to the aims and principles of the CAB service.
- Excellent communication skills.
- Being open and approachable.
- Ability to communicate clearly both orally and in writing.
- Ability to sift through information and extract what is relevant.
- Respect for views, values and cultures that are different to their own.
- An understanding of why confidentiality is important.
- A positive attitude to self-development and assessment.
- Ability to work as part of a team.

- Ability to recognise their own limits and boundaries in the role.
- Ability to use IT systems and packages in the provision of digital assessments, including the ability to input data for record keeping and navigate online information systems.

Full training will be provided