

CLIENT CARE ADVISOR

The Client Care Advisor will act as a liaison between Harmony clients, their families, partner facilities, and community resources. This person is organized and very knowledgeable about senior living options in their area, and can clearly communicate with families. They will display Harmony values to our community and be responsible for converting new leads into qualified move-ins into partner facilities.

Client Care Advisor Job Responsibilities:

- Primarily responsible for converting new leads into partner move-ins
- Builds relationships and educated families on the Harmony referral process and ensure they understand the value of Harmony throughout their senior living search
- Understand family needs and refer to appropriate partner facilities
- Manage the sales process between the family and facilities; guide families through their search process with strong follow up between the families and facilities
- Understand partner facilities offerings, resident requirements, and sales process
- Manage Harmony pipeline in a daily basis and accurately record in our CRM up-to-date information and status of each client being followed
- Communicate daily via phone, e-mail, and in person, to families and partners
- Conduct partner knowledge visits to develop and maintain relationships with partners in the community and opportunities for community partner contracts
- Consistently meet or exceed the monthly Harmony sales goals

Client Care Advisor Job Duties:

- Act as intermediary between Harmony clients, partner facilities, and community referral partners
- Consult with Clients and their families
- Build relationships and educate families on the options available to them in senior living
- Guide families through the search process to find assisted living for their loved one
- Tour appropriate facilities, as approved by the Senior Advisor, with assigned clients
- Give feedback and address concerns of the family with the partner facilities
- Manage and update CRM with all pertinent information
- Available by phone on select nights and weekends and occasionally tour partner facilities on weekends
- Visit Harmony client's after they transition into assisted living
- Visit Doctor offices, rehab facilities, and hospitals to have necessary paperwork signed, as needed
- Participates in appropriate professional, community organizations, and outreach activities when called upon

Client Care Advisor Skills and Qualifications:

Organizational Astuteness, Building Client Relationships, Supports Innovation and Technically Savvy, Knowledge of Community Resources, Marketing Experience in Healthcare Industry, Excellent Communication Skills, Discharge Planning and Social Worker Experience preferred, Financial Resource knowledge and Medicare, Medicaid, and VA Knowledge preferred

I agree to the job description as set forth above.

(signature)

Date