



Candidate Pack

Role: Customer Engagement Advisor



British Heart
Foundation

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Appointment of



Dear Candidate,

Thank you for your interest in our role of Customer Engagement Advisor at British Heart Foundation (BHF).

It is my privilege to lead the Marketing Fundraising and Engagement team for one of the UK's largest charities and the biggest independent funder of research into cardiovascular disease in the UK.

Our vision is a world where everyone has a healthier heart for longer. A world where fewer hearts stop without warning and more of us can live well for longer with the people we love.

We know achieving this won't be easy. But thanks to decades of discovery and scientific advances – we are more confident than ever.

Together, we believe we can stop the devastation for the millions affected by these conditions. All it takes is passionate people like you standing alongside us and believing in the power of research to create a better, brighter, healthier world for everyone.

We are looking for people to join our Customer Engagement Team, which focuses on event stewardship and fundraising within our customer service centre, proactively reaching out to event participants to offer support and ensure their journey with us is smooth and rewarding.

We want an exceptional colleague who exemplifies and champions our values; brave, informed, compassionate and driven. It's an incredibly exciting time to be part of our team. We are more ambitious and determined than ever – because the potential cures and treatments we need are in sight. You could be part of getting us there sooner, so thank you for your interest.

BHF is also proud that we are working towards being a truly diverse organisation, with an Equality, Diversity and Inclusion (EDI) strategy setting out a roadmap of changes we want to see. Our growing commitment to equality, diversity and inclusion spans across our organisation and we pride ourselves on being an inclusive employer who puts diversity at the heart of everything that we do.

So, if you feel you have the skills and experience that we are looking for, and you share our determination to help fund lifesaving research, then we would be delighted to hear from you.

Claire Sadler
Chief Marketing and Fundraising Officer



About us

If you had a heart condition in the early 1960s, your chances of survival were slim. At that time, cardiovascular disease caused more than half of all deaths in the UK, and 7 out of 10 people who had a heart attack in the UK died.

It was clear that something had to change, and fast. So, a group of cardiologists formed British Heart Foundation (BHF) in 1961 and set out to find lifesaving answers through science and provide health information and support to those who need it most.

Since then, research we've funded has been at the forefront of scientific progress across the globe. We've helped transform treatments for heart attack, helped to restart hearts with the development of portable defibrillators and proved that statins can save lives, offering hope to those who desperately need it.

These are incredible achievements and a testament to the passion of the researchers we fund and BHF staff, volunteers, and supporters. Thanks in part to these breakthroughs and many others, the number of people dying from cardiovascular disease each year in the UK has nearly halved since BHF was set up. But our work is far from over.

Despite the strides we've made, cardiovascular disease remains the world's biggest killer. In the UK alone, 1 in 4 of us

die from them. It affects people of all ages and can stop hearts unexpectedly – leaving gaping holes in families and futures in tatters. This is why our research is still needed.

Hearts are precious. We write from them. Sing from them. Follow our dreams with them. And while we understand more about them today than we did seven decades ago, there is still so much left to discover. BHF can't tackle these conditions alone. The only way we can rise to some of the biggest challenges in cardiovascular medicine and save more lives is by continuing to fund scientific research.

Our vision is a world where everyone has a healthier heart for longer. Where fewer hearts stop without warning and more of us can live well with the people we love.

We know achieving this won't be easy. But thanks to decades of discovery and scientific advances, we are more confident than ever. Together, we want to stop the devastation for the millions affected by cardiovascular disease. All it takes is passionate people like you and believing in the power of research to create a better, brighter, healthier world for everyone.

“CPR and heart surgery saved my life when I was six. Research made that happen.”

Jadyn Briggs



Being a responsible charity



Every year we make further progress to being a more sustainable, fairer and well-governed charity.

We raise money to fund research to find cures and develop treatments for the world's biggest killers. And we are determined to do this in a responsible way.

When it comes to environmental factors, links to cardiovascular disease are clear. Research shows that people living with cardiovascular disease are more likely to be negatively impacted by extreme weather such as intense heat and cold.

We're also committed to making BHF as sustainable as possible throughout its operations. This includes a commitment to reducing avoidable waste, and reducing our carbon footprint with a commitment to be a net zero organisation by 2045, at the latest.

This covers all areas of our activities, from direct emissions, such as the heating we use in our BHF offices and stores, to the much more significant indirect emissions from within our supply chain through to how the research we fund is undertaken.

Our sustainability targets are ambitious and have been designed in accordance with the Greenhouse Gas Protocol and the Science Based Targets Initiative (SBTi). Our roadmap to net zero has six focus areas.

- energy efficient and zero emission buildings
- zero emissions transport
- product sourcing and suppliers
- travel and logistics
- waste and circular economy
- responsible research funding.

BHF remains dedicated to investing our funds responsibly, in line with our mission and values.

Sometimes the research we fund may involve animals; this isn't something we take lightly and you can read more about our commitments in research on our website.



Our strategy

Our strategy sets out how we aim to save and improve lives on a scale more ambitious than ever before.

Our vision is a world where everyone has a healthier heart for longer. We'll get closer to that day by focusing on three goals:

- We will stop heart disease before it starts, by revolutionising how we prevent it
- We will save more lives from heart disease by discovering groundbreaking treatments and cures
- We will support everyone with heart disease to live a longer, healthier life.



Belonging

Our push for equality, diversity and inclusion takes many forms, including how we manage our organisation, and how our research funding helps to tackle health inequalities.

An important starting point is making sure BHF's workforce reflects the general population so we can better represent the experiences and voices of the communities we support. A more diverse, inclusive, and fair BHF will not only improve the quality of what we do, but the impact we have.

The ongoing work of our Health Inequalities and Research Inequalities working groups demonstrate our commitments to improve EDI beyond our own workforce, and into the wider healthcare systems and research ecosystems we work so closely with

We want all of our BHF colleagues to have development and progression opportunities, and to embed a more inclusive culture throughout our organisation. Our EDI strategy sets out our roadmap of the changes we want to see.

We have a number of affinity groups within the organisation. These include spaces for working parents, individuals from different religious, racial, and ethnic backgrounds, members of the LGBTQIA+ community and those with disabilities and long term health conditions. These are designed to be spaces for colleagues to feel connected, included and heard.

Colleagues frequently organise internal events to foster a sense of belonging, often led by one of our Affinity Groups which serve as a focal point for colleagues with shared interests to come together. For example, we enjoyed a fantastic and joy-filled celebration of Diwali at both our London and Birmingham offices.

We want to fund lifesaving research for everyone. We can help to achieve this by welcoming colleagues from all backgrounds to come and be part of our BHF family.



Building an inclusive and supportive environment

We recognise the importance of ensuring BHF offers an environment that allows all our colleagues and volunteers to thrive. Our equality, diversity and inclusion (EDI) strategy, continues to deliver positive improvements to ensure this is the case.

Whilst working at BHF, we actively encourage our colleagues to feel safe to bring their true selves to work. We strive to create a culture where colleagues are inquisitive about diversity and keen to get involved in all activities which make individuality and inclusivity part of what we do every single day.

Improving diversity in research

Making the world a fairer place is an important goal, one that we are proud to contribute to by tackling inequalities in cardiovascular health, improving the diversity of our research workforce, and making BHF a more inclusive place to work.

We want to have achieved greater inclusivity in the funding and the design of research, as well as in the cardiovascular research community. We have focused on collating data that defines our starting point, so we can take the right action to improve diversity.

We've published our first research funding diversity report. The report provided valuable insight that is helping us shape our future actions to address under-representation in our research community.

Staff engagement

Every year we reinforce our EDI commitment through a colleague engagement survey, to help us understand how we can continue to improve.



One of the most important questions is whether BHF has created an environment where people of diverse backgrounds can succeed. Last year, 2023-24, we were at 86% and set a target score of 90% for January 2025 which we are pleased to say we achieved this year!

Enhancing our benefits

We aim to empower and support the health and wellbeing of everyone who works at BHF, and so we continually review our staff benefits to ensure they are fair and attractive both to current and potential employees.

We've recently added a holistic and flexible Support Leave provision for everyone. This provides extra paid time off to support colleagues or others close to them during a life event.

Celebrating Pride

Pride is a chance for us to learn and show support for the LGBTQIA+ community. BHF colleagues have taken part in Pride events across the country since 2018, including Pride marches in Edinburgh, Cardiff, Belfast and London.

Wellbeing

We take immense pride in fostering an environment that prioritises the health, safety, and wellbeing of our employees, volunteers, and customers. Our excellence in health, safety and wellbeing is about cultivating a culture where every individual feels valued and safe.

One of our standout initiatives is the Live Well Work Well project group, which plays a pivotal role in enhancing workplace wellbeing. This group organises a myriad of activities and resources aimed at promoting and supporting mental, physical, social and financial health.

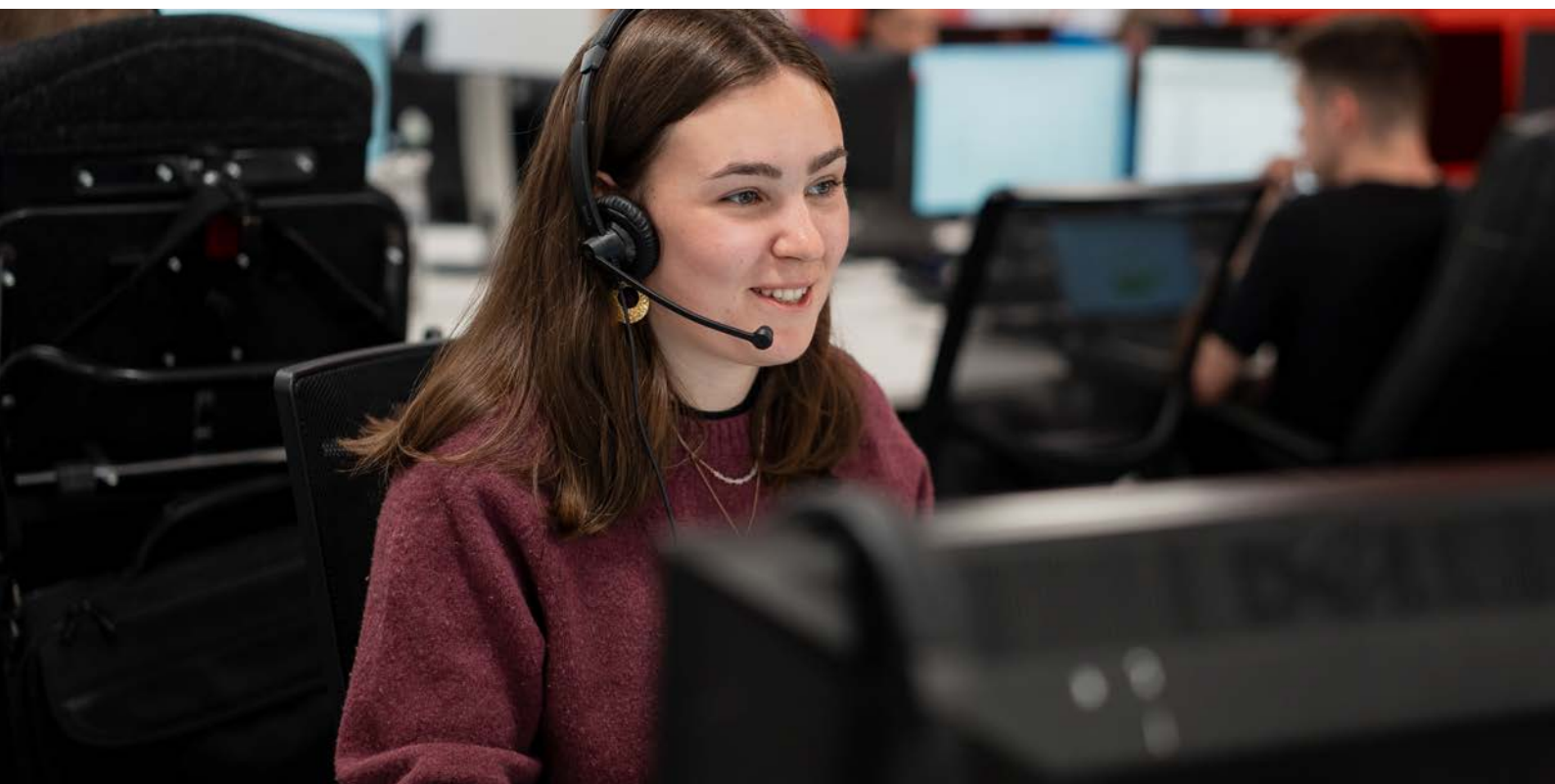
At BHF, we believe that a safe and healthy workplace is the foundation of success. As we continue to innovate and grow, our commitment to health, safety, and wellbeing remains unwavering. Join us and be a part of an organisation that not only values your professional contributions but also cares deeply about your overall wellbeing.

A flexibly connected organisation

Our flexibly connected programme allows colleagues to work flexibly, in a way that helps unlock their best work for the cause.

The programme has been engaging with our Champions network, gathering insights from colleagues through our Ways of Working Study, to continuously adapt the approach where needed. It was awarded the Best Flexible Working Strategy at the HR Excellence Awards.

Join us at BHF and be part of a team that truly cares about your wellbeing. Together, we can make work to a world where everyone has a healthier heart for longer, while supporting each other every step of the way.



Our People Power

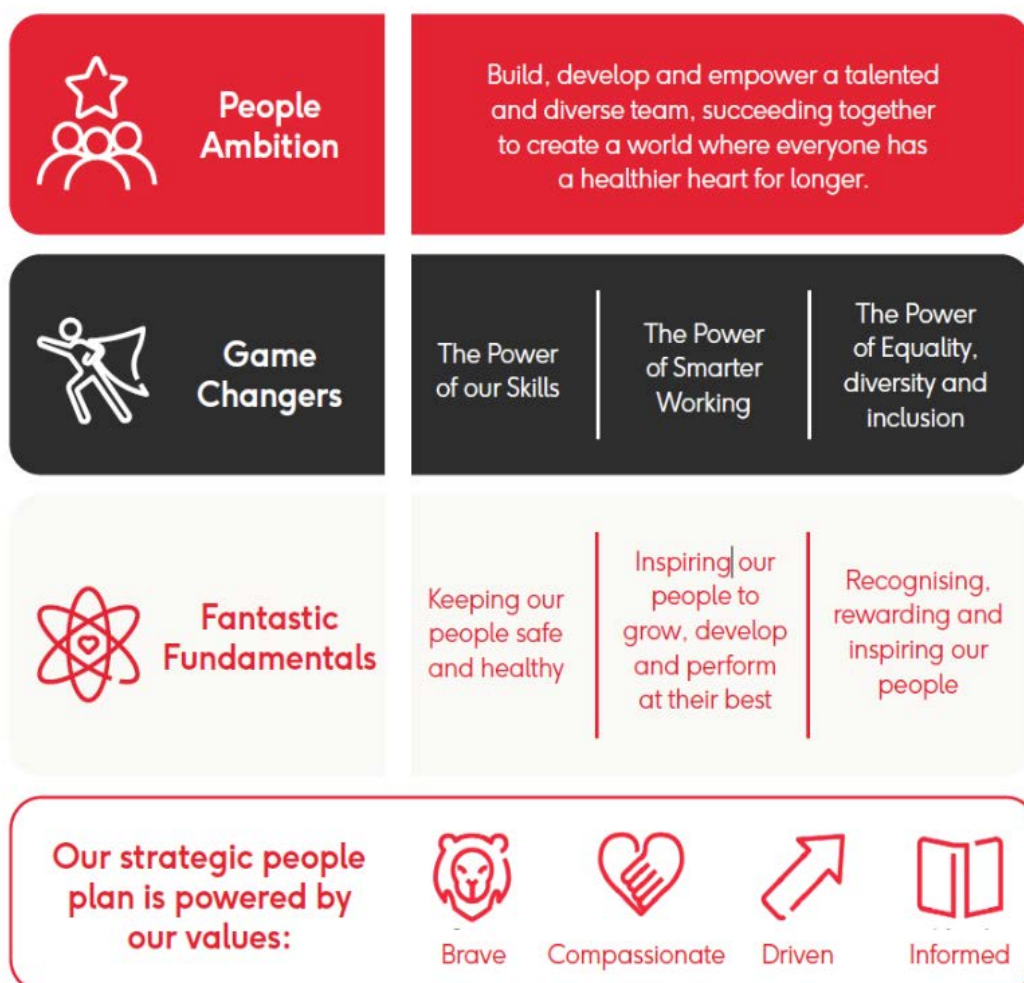


Our vision is a world where everyone has a healthier heart for longer, but we can't get there without our brilliant colleagues and volunteers.

At the heart of Our People Power sits our central people ambition, through which we will drive performance to further progress and accelerate BHF's lifesaving work, leveraging the unique talents and skills of our people.

We will power up our people to bring their best every day, providing a brilliant work experience, continuing to make BHF a great place to work. Through inspiring, empowering and enabling our people, whatever their role and background, we will collectively power towards our vision as a world where everyone has a healthier heart for longer.

To achieve our strategic aims, we need everyone pulling in the same direction. Our people ambition unites us all, bringing all our people (colleagues and volunteers) together to play their part in creating a world where everyone has a healthier heart for longer.



Our values

We are proud that the work we do is funding groundbreaking, lifesaving research. Our vision is a world in which everyone has a healthier heart for longer.

That's why our values are key to defining who we are, how we do things and how we can achieve our ambitions so that every pound we raise funds the research that keeps millions of hearts beating.



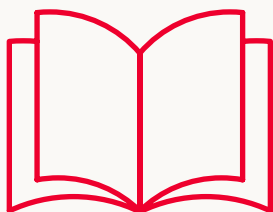
Brave

We speak out.
We're decisive.
We're innovative.



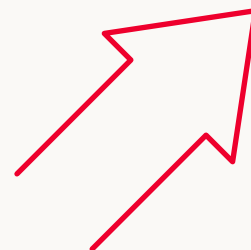
Compassionate

We're open and honest.
We respect others.
We care.



Informed

We're clear.
We're open minded.
We work together.



Driven

We're focused.
We're determined.
We keep learning.

Our benefits

We all achieve more together when we're happy and healthy. As a world class organisation, we offer competitive salaries and an attractive package of benefits, designed to support the health and wellbeing of everyone who works here. Our generous benefits include:



Annual leave

Our annual leave allowance of 30 days plus bank holidays is among the best in the sector.



Health care

We offer employees private healthcare, dental health cover and a contribution towards your gym membership.



Family care

We offer 12-weeks' pay for all family leave including maternity, paternity, adoption and neonatal care leave and are committed to offering returning parents and guardians the opportunity to work flexibly.



Live well. Work well.

Heart health is central to our mission, and that starts with you. We provide a programme of activities, opportunities and guidance to inspire and support you to live a healthy and happy life, at home and at work.



Support leave

We offer a holistic support leave of up to 10 days leave to support colleagues in time of uncertainty, where you may need to take additional time away from work to support yourself or others during a life event, such as caring.



Pensions

Our generous pension scheme will support you to save for your retirement. You can contribute a minimum of 3% but can increase this to 8% or more, with employer contribution starting at 5% and increasing to a maximum of 10%.

Customer Service Centre



At the heart of British Heart Foundation is our Customer Service Centre (CSC), the central hub for every interaction with our customers and supporters. Whether it's a phone call, email, social media message, or letter, our dedicated CSC team responds with warmth, empathy, and efficiency.

Driven by purpose and powered by people, the CSC team plays a vital role in delivering exceptional service and building lasting connections. Passionate about making a difference every day, their work reflects the values at the core of BHF.

Want to see what makes this team so special? Watch the video to [hear](#) directly from our CSC colleagues and discover why this is such a rewarding place to grow your career. deeply about your overall wellbeing.

Hear from the team:

"What I'd say is unique about working in the customer service centre is having that overall goal of being able to fund life-saving research and everybody working towards that end goal" - Dave

"I love working at the British Heart Foundation because I feel like I'm very passionate about helping other people. I love hearing, you know, the supporter's stories. I love getting involved with the team at the customer service centre as well. I think we all come together as one." Amanda

"I like working at the British Heart Foundation because as a mum of young, very young children, I have a really good work-life balance. I work from home four days a week and I'm in the office once. I like listening to, talking to supporters and knowing that we're making a difference and helping them as well." Veena



Job description



Job title	Customer Engagement Advisor - Defib Sales		
Directorate	Marketing Fundraising and Engagement		
Team	Customer Service		
Reporting to	Customer Service Team Leader		
Agility contract type	Blended (Home & Office)	No of direct reports	0
Location	Dual location – Home & Birmingham Office (B37 7YE)		
Budget responsibility	N/A		
Job level	7	Date	Oct 2025

Role Summary

To actively promote the BHF products and convert leads/prospects to actual sales. Maintaining sales cycle from lead generation to closing of lead and identifying future sales opportunities.

Respond to and resolve customer queries (e.g., health products) and deliver an exceptional level of Customer Service.

Key responsibilities



Customer Engagement

- Improve Customer Experience and enhance revenue through outbound sales activity and relationship management
- Respond to incoming communication via email, calls and live chat
- Convert and track potential leads to sales
- Offer upselling as part of outbound and inbound calls/communications
- Advise prospective and current customers by answering questions and addressing concerns about purchased products
- Actively utilise company data to chase leads and potential sales opportunities using scripted guides
- Working towards financial and Customer Satisfaction targets
- Create, develop, and maintain professional and mutually beneficial relationship with customers
- Track and follow the life of an order from enquiry to aftersales.

Customer Care

- Ensure all enquiries receive a prompt, efficient and helpful response within the agreed service levels.
- Liaising with internal and external customers to resolve queries.
- Build relationships with suppliers in order to provide a swift response to customers.

Customer Data

- Use BHF's Customer Relationship Management database to keep records of all contact made, updating customers' addresses, contact preferences and all other admin needs
- Assist in the co-ordination and reporting of complaints data within the BHF CRM system, relevant databases and paper records

Reporting

- Generate customer contact insight and make improvement suggestions
- To record and log all sales activity, from lead generation, completed sales to follow up dates for upselling

Continuous Improvement

- Contribute to the continuous development of activities, systems and processes relating to all aspects of customer service

Knowledge, training and qualifications



- A high standard of written and spoken English.
- A good standard of IT skills and computer literacy specifically relating to Microsoft Office packages, database/CRM systems and the recording/inputting of data.
- Understand contract law and statutory regulations ensuring compliance and best practice

Experience

- Experience working in a Business to Business or retail environment.
- Experience of outbound calling in a customer service or sales environment with an objective of relationship building and enhancing revenue.
- Experience of converting inbound and outbound leads to sales
- Experience of upselling products over the phone or via email.
- Experience of maintaining accurate and timely data entry and record-keeping

Skills and attributes



- Show a real passion for delivering world-class customer service.
- Ability to demonstrate excellent selling, negotiation and communication skills, with energy and empathy by telephone and in writing.
- Able to build relationships with suppliers and customers.
- Ability to demonstrate attention to detail.
- Excellent administrative and time management skills to deliver results on time and within target.
- Enthusiastic and “can-do” positive attitude.
- A flexible and adaptable approach.
- A collaborative team player willing to share knowledge and learning openly and driven.

Safeguarding

At British Heart Foundation (BHF), we are committed to creating a safe and rewarding environment for all of our people to work and volunteer. This means we have a robust safeguarding policy to ensure everyone is treated properly, and a whistle blowing service so people can raise any concerns they have confidentially.

Data protection

During your employment, this role will encounter some personal data. The role will be permitted to access and use the following types of personal data:

- Personal details, contact information and/or family details
- Personal financial information - including any of the following - donations, gifts, bank account, card numbers
- Personal Sensitive data - including any of the following - health, race, ethnicity, sexual orientation, political affiliation, trade union membership, religious or philosophical beliefs, biometric or genetic data, criminal record

If you find yourself with access to personal data you are not authorised to have, you must report it to your line manager and the IT Service Desk immediately.

How to apply



To apply for this role please use the apply button via the jobs page on our website. Our process involves submitting your CV and a supporting statement, which should outline your interest and explain how you meet the criteria stated in the person specification. You may also be asked a few application questions, depending on the role you're applying to.

All applications are managed by our Recruitment team. If you wish to speak with a member of the team regarding the role and your application please contact us on careers@bhf.org.uk

Should you need any adjustments to the recruitment process at application stage please contact the Recruitment team on careers@bhf.org.uk





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