



# POSITION DESCRIPTION

## Position Details

<b>Position Title:</b> Team Leader Member Contact (Hobart/Launceston)	<b>Business Unit:</b> Member Services
<b>Position No:</b> DP0602/DP0603	<b>Team:</b> Member Contact
<b>Classification:</b> CED 5	<b>Reports to:</b> Manager Member Contact
<b>Employment Type:</b> Full-Time, Fixed Term	<b>Direct Reports to this Position:</b> Hobart: <ul style="list-style-type: none"> <li>▪ Senior Superannuation Consultant (2)</li> <li>▪ Superannuation Consultant (8)</li> <li>▪ Member Contact Officer (Reception) (2)</li> </ul> Launceston: <ul style="list-style-type: none"> <li>▪ Senior Superannuation Consultant (1)</li> <li>▪ Superannuation Consultant (3)</li> <li>▪ Member Contact Officer (Reception) (1)</li> </ul>
<b>Date:</b> February 2010	

## Primary Role of Position

The primary role of the position is to lead, coach, motivate, and coordinate the daily workflow of the Member Contact Team, ensuring the timely provision of efficient, high quality information and general product advice services to RBF members that build life-long relationships and advocacy for RBF. The position also provides quality control to the Member Contact Team and improves team processes and procedures whilst ensuring that benchmarks are met.

## Environment and Scope

The Retirement Benefits Fund Board administers and manages Superannuation Schemes in accordance with the *Retirement Benefits Act 1993* and all relevant legislation and Trust Deeds. The Retirement Benefits Fund (RBF) operates in a competitive “choice of fund” environment.

The Team Leader Member Contact provides coaching, supervision and coordination of daily workflow to the Member Contact Team which is situated within the Member Services Business Unit. The Member Services Business Unit is operationally divided into four areas: Member Contact, Member Solutions, Knowledge and Training, and Compliance. The overarching function of the Member Services Business Unit is to provide valued financial services to RBF members that help them plan and manage their wealth creation and retirement.

Located in Hobart and Launceston, the Member Contact team (comprised of senior superannuation consultants, superannuation consultants and member contact officers (reception)) provides the initial front-line service experience to RBF members and focusses on the provision of high volume information services, general product information and standard estimates primarily through direct contact channels such as telephone, correspondence and member walk-in and counter enquiries.



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The Team Leader Member Contact is expected to ensure that the team is functioning to standard within RBF's relationship-based service delivery model and member service KPIs.

While the Team Leader Member Contact is required to operate with autonomy and independence in the provision of day-to-day services, coordination of the Team's daily workflow, and the setting of outcomes, there is an expectation that it would work closely with its Manager in terms of providing regular ongoing feedback about pertinent issues and seeking guidance on recommended courses of action for any specific issues that are identified.

Strong collaborative working relationships are required to be developed and maintained with the Team Leader in Launceston/Hobart, as well as with all key operational areas of the organisation, and corporate service agents. Liaison with internal and external stakeholders is required.

Through its quality assurance and mentoring roles, the position is expected to promote and support the substantial business and cultural change that RBF is currently undergoing.

### Organisational Values and Culture

At RBF we want our performance to be amongst the best. We have a set of core values that we hold to be important above all others and have identified underpinning action descriptors that are crucial to our success. Our values are **responsibility, respect, integrity, quality and achieving together**. In performing this role, you are expected to bring these values 'alive' through your daily behaviours.

You are required to comply with all relevant legislation, laws, regulations, standards, codes and RBF policies and procedures.

While at work you must take reasonable care of your own health and safety and the health and safety of other people, including people working under your supervision or direction who may be affected by your acts or omissions at the workplace, in accordance with current Tasmanian Workplace Health and Safety Legislation.

### Reporting/Working Relationships

1. The position is directly responsible to the Manager Member Contact and is expected to operate with autonomy and independence in undertaking responsibilities.

2. The position provides direction and supervision to the Member Contact Team.

3. Regular liaison and interaction with the following is required:

- Member Services management team
- Business Relationship Officers
- RBF Executive Management.
- External service providers and organisations
- Members



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### Key Accountabilities

*The following description of accountabilities is not exhaustive and may include others as directed from time to time.*

1. Lead, coach, motivate and coordinate the daily workflow of the Member Contact Team in Launceston/Hobart.
2. Monitor the performance of staff and conduct performance reviews.
3. Through effective resource allocation ensure that the high volume direct contact service members receive is accurate, consistent, compliant, high quality, and helps to build their relationship with RBF.
4. Develop and implement initiatives and procedures that will improve the efficiency and quality of service provided by the Member Contact Team.
5. Undertake compliance and quality control reviews of staff on a regular basis to ensure high quality of all contact services provided to members, both written and verbal and ensure member grievances are dealt with promptly as they arise.
6. Oversee the development of Member Contact staff.
7. Ensure the Member Contact team members' professional development needs are maintained in line with industry requirements, including keeping abreast of new product development, legislative changes, and best practice customer service trends to ensure the ongoing enhancement of the team's currency of knowledge and skills and performance.
8. Ensure compliance with relevant administrative, policy and legislative guidelines.

### Selection Criteria

*All selection criteria listed below are specific to this role and must be addressed by application for this position.*

### Qualifications, Skills and Experience

1. Experience supervising, leading, coaching and motivating staff to work towards team goals (preferably within a Call Centre or other high volume customer service work environment), including an ability to give direction, coordinate workflow, exercise sound judgement, foster positive team development, promote and achieve quality outcomes, understand relationships and manage and develop self.	Essential
2. Experience working in and knowledge of the superannuation or financial services industries, specifically in relation to the provision of high volume contemporary best practice customer service <b>and</b> the ability to quickly acquire requisite knowledge of RBF products and services.	Desirable
3. Recognised relevant tertiary level qualification; that is Finance, Commerce, or Diploma of Financial Services (Superannuation or Financial Planning), or	Essential



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equivalent, with an undertaking to continue further studies.	
4. Excellent oral and written communication, interpersonal, negotiation and liaison skills; together with the ability to represent RBF in dealings with external stakeholders in an ethical and professional manner.	Essential
5. Ability to handle complex issues within tight deadlines and work under pressure to meet established benchmarks within a changing work environment.	Essential
6. Well developed organisational, analytical and problem solving skills and the ability to use own initiative, analyse and integrate information from a variety of sources to arrive at solutions.	Essential
7. Well developed numerical and cognitive skills to apply mathematical methods or formulae as appropriate.	Essential
8. Strong systems experience and PC skills, and the ability to use a range of office technology to achieve desired work outcomes.	Essential
9. Current driver's licence.	Essential

### Conditions of Appointment

Appointment is subject to:

- A satisfactory pre-employment police record check and National Police Clearance (less than six months old); such check to be completed prior to taking up the appointment, promotion or transfer.
- Identity validation
- Satisfactory reference checks (minimum of two required from past employment) and confirmation of the curriculum vitae/resume
- Confirmation of qualifications and professional memberships
- Confirmation of Australian or New Zealand citizenship, Permanent Resident status or valid work visa

### Additional Requirements

- This is primarily a sedentary position which involves desk-based computer work, with routine bending, lifting and occasional walking between office sites.
- Intrastate travel by motor vehicle may be required.



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## Verification and Approval

### Human Resources

Signed by \_\_\_\_\_

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

### Business Unit Executive Manager

Signed by \_\_\_\_\_

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Review Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

**Note:** All position descriptions may be subject to review periodically; at the time of performance appraisal or when necessary to meet business needs. Such review may be initiated by the employee, or the employer subject to RBFB classification review guidelines.