

Financial Institutions of New Zealand Remuneration Report

Position descriptions | March 2020



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Position Family: Actuarial

Senior Actuary	65010
Actuary	65015
Senior Actuarial Analyst	65020
Actuarial Analyst	65025
Actuarial Student	65030

Position Family: Business Commercial and Corporate Banking

Agribusiness

Agribusiness Branch Manager	Aon.BCC.AG202.5
Senior Banker - Agribusiness	Aon.BCC.AG201.5
Banker - Agribusiness	Aon.BCC.AG201.4
Senior Associate - Agribusiness	Aon.BCC.AG201.3
Analyst - Agribusiness	Aon.BCC.AG210.3

Business Banking

Senior Banker - Business	Aon.BCC.BB101.5
Banker - Business	Aon.BCC.BB101.4
Senior Associate - Business	Aon.BCC.BB101.3
Analyst - Business	Aon.BCC.BB110.3

Commercial

Senior Banker - Commercial	Aon.BCC.CM301.5
Banker - Commercial	Aon.BCC.CM301.4
Senior Associate - Commercial	Aon.BCC.CM301.3
Analyst - Commercial	Aon.BCC.CM310.3

Corporate Banking/Corporate Finance/Institutional

Director	Aon.BCC.CF401.6
Associate Director	Aon.BCC.CF401.5
Relationship Manager	Aon.BCC.CF401.4
Analyst - Corporate Banking/Corporate Finance/Institutional	Aon.BCC.CF412.3
Analyst - Entry Level	Aon.BCC.CF410.2

Management

Regional Manager - Business Commercial & Corporate Banking	Aon.BCC.BC101.6
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Property, Equipment & Asset Finance

Manager - Property/Equipment/Asset Finance	Aon.BCC.AF501.6
Business Development Manager - Property/Equipment/Asset Finance	Aon.BCC.AF501.4
Account Manager - Property/Equipment/Asset Finance	Aon.BCC.AF501.3
Analyst - Property/Equipment/Asset Finance	Aon.BCC.AF510.3

Position Family: Contact Centre

Contact Centre General Manager	49005
Contact Centre Manager	49010
Contact Centre Team Leader	Aon.CSP.CC101.4
Senior Banking Advisor	Aon.CSP.CC107.4
Banking Advisor	Aon.CSP.CC107.3
Banking Consultant	Aon.CSP.CC101.3
Outbound Sales Representative	Aon.CSP.CC104.2
Senior Customer Service Consultant	Aon.CSP.CC105.2
Customer Service Consultant	Aon.CSP.CC101.1

Position Family: Corporate Services

Administration

Administration Manager	15030
Administration Team Leader	15035
Administration Officer - Level 3	15045
Administration Officer - Level 2	15050
Administration Officer - Level 1 - Entry Level	15055

Economist

Senior Economist	15205
Economist	15200

Facilities

Facilities Manager	15220
Facilities Officer	15225

Legal and Compliance

Company Secretary	15085
Legal Counsel	15090
Senior Solicitor	15095
Solicitor	15100
Compliance Manager	15120
Senior Compliance Officer	15125
Compliance Officer	15130

Project Management

Manager - Special Projects	15070
Project Planning Specialist	15075
Project Team Leader	15080
Project Coordinator	15081

Risk Management

Divisional Manager - Risk Management	15135
Senior Risk Management Analyst	15140
Risk Management Analyst	15145

Secretarial

Personal Assistant to Senior Executive(s)	15010
Personal Assistant	15015
Receptionist/Telephonist	15020

Strategy

Strategy Manager	15400
Senior Strategy Analyst	15405
Strategy Analyst	15410

Position Family: Executive

Chief Executive Officer	10005
Chief Operating Officer	10010
Chief Risk Officer	10120
Sales Director	10035
Marketing Director	10045
Finance Director/Chief Financial Officer	10055
Human Resources Director	10065
Chief Information Officer	10090
Head of Corporate Strategy	10100
Chief Legal Counsel	10060
Chief Economist	10111
General Manager/Head of Retail Banking	Aon.EXE.RF101.7
General Manager/Head of Business & Commercial Banking	Aon.EXE.BC101.7
General Manager/Head of Corporate Banking	Aon.EXE.CF101.7
General Manager/Head of Investment Management	Aon.EXE.IM101.7
General Manager/Head of Profit Centre	Aon.EXE.EX101.7
General Manager/Head of Operational or Support Function	Aon.EXE.EX201.7
General Manager/Head of Taxation	Aon.EXE.TX101.7
General Manager/Head of (not otherwise classified)	Aon.EXE.EX301.7

Position Family: Finance

*Accounts*Senior Accounts Officer [14105](#)Accounts Officer [14110](#)*Credit Control*Credit / Collections Manager [14130](#)Credit / Collections Team Leader [14135](#)Senior Credit / Collections Representative [14140](#)Credit / Collections Representative [14145](#)*Financial Accounting*Financial Accounting Manager [14025](#)Senior Financial Accountant [14030](#)Financial Accountant [14035](#)*General Accounting*Assistant Accountant [14060](#)Finance Administrator [14150](#)*Internal Audit*Internal Audit Manager [14090](#)Senior Internal Auditor [14095](#)Internal Auditor [14100](#)*Management Accounting*Management Accounting Manager [14040](#)Senior Management Accountant [14045](#)Management Accountant [14050](#)*Payroll*Payroll Manager [14115](#)Payroll Team Leader [14119](#)Senior Payroll Officer [14120](#)Payroll Officer [14125](#)*Tax*Corporate Tax Manager [14070](#)Senior Tax Accountant [14075](#)Tax Accountant [14080](#)*Treasury*Group Treasury Manager [14200](#)Treasury Manager [14205](#)

Position Family: Graduates

Graduate - Technical Degree

[20015](#)

Graduate - Non-Technical Degree

[20005](#)

Position Family: Human Resources

HR Manager - Generalist	17030
Senior HR Consultant - Generalist	17055
HR Consultant - Generalist	17080
HR Officer	17102
HR Administrator	17105
Senior HR Consultant - Recruitment	17070
HR Consultant - Recruitment	17095
Senior HR Consultant - Learning & Development	17065
HR Consultant - Learning & Development	17090
HR Officer - Learning & Development	17103

Position Family: Information Technology

Business Analysts

Business Analysis Manager	18265
Senior Business Analyst	18270
Business Analyst	18275
Junior Business Analyst	18280

Data Centre

Senior Data Centre Operator	18240
Data Centre Operator	18245
Senior Operations Support Analyst	18255
Operations Support Analyst	18260

IT Support

IT Support Manager	18145
Senior Desktop Support Analyst	18160
Desktop Support Analyst	18165
Helpdesk Manager	18180
Senior Helpdesk Support	18190
Helpdesk Support	18195
Team Leader - Systems Administrator/Applications Support	18209
Senior Systems Administrator	18210
Systems Administrator	18215
Systems Administration Analyst	18220

Management

IT General Manager (Business Unit/Region)	18005
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Programmers

Team Leader - Applications Development	18069
Senior Developer	18070
Developer	18075

Project Management

IT Project Manager (Large)	18020
IT Project Manager (Medium)	18025
IT Project Team Leader	18030
Project Office Administrator/Coordinator	18040

Test Analysis

Senior Test Manager	18095
Test Manager	18100
Senior Test Analyst	18105
Test Analyst	18110

Position Family: Investment Management

Investment Analytics

Manager - Investment Analytics	Aon.INM.IA201.6
Senior Analyst - Investment Analytics	Aon.INM.IA112.4
Analyst - Investment Analytics	Aon.INM.IA110.3

Investment Management

Head of Investment Management	Aon.INM.IM102.6
Senior Portfolio Manager - Investment Management	Aon.INM.IM101.6
Portfolio Manager - Investment Management	Aon.INM.IM101.5
Senior Analyst - Investment Management	Aon.INM.IM112.4
Analyst - Investment Management	Aon.INM.IM110.3
Investment Support Administrator	Aon.INM.IM101.2

Position Family: Marketing

Marketing

Senior Marketing Manager	13005
Marketing Manager	13010
[NEW] Senior Marketing Consultant - Generalist	13220
[NEW] Marketing Consultant - Generalist	13225
[NEW] Marketing Associate	13230
Marketing Administration Assistant	13035
Marketing Analyst	13030

Product / Brand Management

[NEW] Functional Lead of Marketing - Brand	13013
Brand Manager - Level 3	13015
Brand Manager - Level 2	13020
Brand Manager - Level 1	13025

Product Development

Head of Product Development	Aon.MKT.PD101.6
Senior Product Development Manager	Aon.MKT.PD101.5
Product Development Manager	Aon.MKT.PD101.4
Product Analyst	Aon.MKT.PD101.3

Position Family: Operations Support

Lending Operations

Manager - Lending Operations	Aon.OPS.LO101.5
Team Leader - Lending Operations	Aon.OPS.LO101.4
Senior Lending Officer	Aon.OPS.LO101.3
Lending Officer	Aon.OPS.LO101.2

Loss Recovery / Collections

Manager - Loss Recovery Operations	Aon.OPS.LR201.5
Team Leader - Loss Recovery Operations	Aon.OPS.LR201.4
Senior Loss Recovery Officer	Aon.OPS.LR201.3
Loss Recovery Officer	Aon.OPS.LR201.2

Processing & Transaction Support

Manager - Processing & Transaction Support	Aon.OPS.TS301.5
Team Leader - Processing & Transaction Support	Aon.OPS.TS301.4
Senior Processing & Transaction Support Officer	Aon.OPS.TS301.3
Processing & Transaction Support Officer	Aon.OPS.TS301.1

Sales Support

Manager - Sales Support Operations	Aon.SLS.SS401.5
Team Leader - Sales Support Operations	Aon.SLS.SS401.4
Sales Support Officer	Aon.SLS.SS401.3
Sales Support Administrator	Aon.SLS.SS401.2

Position Family: Retail Finance

Branch

Branch Manager (large branch >12)	Aon.RET.BR108.5
Branch Manager (medium branch 6-12)	Aon.RET.BR104.5
Branch Manager (small branch <6)	Aon.RET.BR101.5
Senior Personal Banker	Aon.RET.BR101.4
Team Leader - Retail Banking	Aon.RET.BR105.4
Personal Banker	Aon.RET.BR101.3
Senior Customer Service Consultant	Aon.RET.BR105.2
Customer Service Consultant	Aon.RET.BR101.2

Lending - Broker Relationship Management

Manager - Broker Relationship Management	Aon.RET.RM401.5
Senior Account Manager	Aon.RET.RM401.4
Account Manager - Lending - Broker Relationship Management	Aon.RET.RM401.3

Lending - Broking

Manager - Mortgage Broking	Aon.RET.LB301.5
Senior Mortgage Broker	Aon.RET.LB301.4
Mortgage Broker	Aon.RET.LB301.3

Management

National Manager	Aon.RET.RF101.7
Regional Manager - Retail Banking	Aon.RET.RF101.6

Mobile Lending

Manager - Mobile Lending	Aon.RET.MM201.5
Senior Mobile Lender	Aon.RET.MM201.4
Mobile Lender	Aon.RET.MM201.3

Private Banking

Regional Manager - Private Banking	Aon.RET.PB601.5
Senior Client Manager	Aon.RET.PB601.4
Client Manager	Aon.RET.PB601.3

Wealth Management - Financial Advice

Head of Financial Advice	Aon.RET.FA501.6
Practice Manager - Financial Advice	Aon.RET.FA501.5
Senior Financial Advisor	Aon.RET.FA501.4
Financial Advisor	Aon.RET.FA501.3
Para Planner - Financial Advice	Aon.RET.FA501.2

Position Family: Risk and Compliance

Financial Crime

Head of Financial Crime	Aon.RSK.FC301.6
Financial Crime Manager	Aon.RSK.FC301.5
Senior Risk Analyst	Aon.RSK.FC301.4
Risk Analyst	Aon.RSK.FC301.3

Lending and Credit Risk

Head of Credit Risk	Aon.RSK.CR101.6
Credit Risk Manager	Aon.RSK.CR101.5
Senior Risk Analyst - Lending & Credit Risk	Aon.RSK.CR101.4
Risk Analyst - Lending & Credit Risk	Aon.RSK.CR101.3

Market Risk

Head of Market Risk	Aon.RSK.MR401.6
Market Risk Manager	Aon.RSK.MR401.5
Senior Risk Analyst - Market Risk	Aon.RSK.MR401.4
Risk Analyst - Market Risk	Aon.RSK.MR401.3

Operational Risk and Compliance

Head of Operational Risk and Compliance	Aon.RSK.OR201.6
Manager - Operational Risk and Compliance	Aon.RSK.OR201.5
Senior Risk Analyst	Aon.RSK.OR201.4
Risk Analyst	Aon.RSK.OR201.3

Position Family: Sales

Senior Sales Manager	11005
Sales Manager	11015
Business Development Manager	11115
Business Development Specialist	11120
Sales Administration/Internal Sales Team Leader	11130
Sales Administrator/Coordinator/Internal Sales Representative	11135

Position Family: Superannuation and KiwiSaver

Scheme Administration Manager / Operations Manager	67025
Scheme Administration Team Leader	67028
Senior Scheme Administrator	67030
Scheme Administrator - Level 3	67035
Scheme Administrator - Level 1-2	67040

Position Description

Position title: Senior Actuary
Position code: 65010
Level: 5

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title: Actuary
Position code: 65015
Level: 4

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title: Senior Actuarial Analyst
Position code: 65020
Level: 3

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title: Actuarial Analyst
Position code: 65025
Level: 2

Responsible for

Supporting key Actuarial activities through the provision of Actuarial support functions.

Report to

Fully Qualified Actuary.

Supervises

No supervisory responsibilities.

Main activities

- Maintaining asset/liability databases for new products and composites.
- Updating database asset, liability, cash flow and unit price data on a regular basis.
- Providing earning rates, crediting rates and factors to valuation teams.
- Understanding asset/liability management system methodology and suggesting improvements.
- Provide IER, adjusted earning rate and financial data for full crediting rate review on a quarterly basis.
- Distributing crediting rates.
- Providing data for review of short-term products.
- Providing technical support for Actuaries. Drafting Actuarial reports.
- Developing and use models for Actuarial processes, e.g.. profitability and valuation.
- Advising internal clients on process methods and outcomes.

Key skills

Nil.

Internal contacts

Other Actuaries; Product Designers; Finance departments; Auditors.

External contacts

Other Actuaries (internal or external, such as consulting Actuaries); Finance departments; Auditors.

Typical experience

Completion of 9-11 Actuarial subjects with experience in more than one Actuarial area.

Other comments

Position Description

Position title: Actuarial Student
Position code: 65030
Level: 1

Responsible for

Supporting key Actuarial activities through the provision of Actuarial support functions.

Report to

Fully Qualified Actuary.

Supervises

No supervisory responsibilities.

Main activities

- Maintaining asset/liability databases for new products and composites.
- Updating database assets, liability, cash flow and unit data on a regular basis.
- Providing earning rates, crediting rates and factors to valuation teams.
- Understanding asset/liability management system methodology and suggesting improvements.
- Providing IER, adjusted earning rate and financial data for full crediting rate review on a quarterly basis.
- Distributing crediting rates.
- Providing data for review of short-term products.
- Providing technical support for Actuaries.
- Developing and using models for Actuarial processes, e.g., profitability and valuation.
- Advising internal clients on process methods and outcomes. Drafting Actuarial reports.

Key skills

Nil.

Internal contacts

Other Actuaries; Product Designers; Finance departments; Auditors.

External contacts

Other Actuaries; Finance departments; Auditors.

Typical experience

Completion of 5-8 Actuarial subjects.

Other comments

Position Description

Position title: Agribusiness Branch Manager
Position code: Aon.BCC.AG202.5
Level: 5

Responsible for

Managing the activities of an agribusiness branch to achieve branch profit and other targets.

Report to

Regional Manager

Supervises

Senior and associate bankers, branch staff

Main activities

- Ensuring the quality of lending, credit management and control of bad debts within the Branch/Office is maintained to required standards.
- Approving loans within authority/discretionary limits and referring larger amounts through relevant channels for approval.
- Maintaining and developing the personal skills of all staff in the branch to maximise target achievement. This role will include recruitment, training and development, reward and performance assessment.
- Being accountable for the maintenance of the organisation's policies and procedures within the branch within prescribed limits of approval.
- Submitting all required reports concerning branch operations promptly and accurately.
- Ensuring all branch and customer records and assets are safeguarded. Continually monitoring and improving office processing, procedures and documentation.
- Actively promoting the organisation's product range and developing the business activities of the branch through continual customer contact.

Key skills

- Effective management skills.
- Excellent knowledge of Branch regulations.
- Excellent communication skills.

Internal contacts

Head Office

External contacts

Major customers, developers, insurers, Government and local authority departments, other financial institutions.

Typical experience

10+ years experience within an Banking Sales/Business Development role, coupled with managerial and supervisory experience

Other comments

Position Description

Position title: Senior Banker - Agribusiness
Position code: Aon.BCC.AG201.5
Level: 5

Responsible for

Servicing a number of key agribusiness clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Branch Manager, Regional Manager

Supervises

May Supervise Bankers/Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans.
- Reviewing existing client portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority
- Planning individual development plans for key customers.
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets and future growth potential.
- Effective negotiation and communication skills and developing management skills.
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities.
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Key Clients at all levels.

Typical experience

7+ years experience within an Banking Sales/Business Development role, coupled with undergraduate qualifications major in Finance.

Other comments

Alternative titles: Senior Account Manager, Senior Relationship Manager - Agribusiness

Position Description

Position title: Banker - Agribusiness
Position code: Aon.BCC.AG201.4
Level: 4

Responsible for

Servicing a number of key agribusiness clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Where appropriate, providing service to intermediaries, for example new business portfolio, renewal negotiations, acceptance and authorisation of lending.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business
- Accepting business within risk acceptance authority and referring risks in excess of their authority to the Regional Sales Manager
- Planning individual portfolio management for key customers
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4 - 5+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative titles: Account Manager, Rural Manager, Partner - Agribusiness, Relationship Manager - Agribusiness

Position Description

Position title: Senior Associate - Agribusiness
Position code: Aon.BCC.AG201.3
Level: 3

Responsible for

Servicing a number of key agribusiness clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager or Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business.<new line.>Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Sales Representative

Position Description

Position title: Analyst - Agribusiness
Position code: Aon.BCC.AG210.3
Level: 3

Responsible for

Providing quantitative Research and information to facilitate informed business decisions.

Report to

Regional Manager or Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Business Bankers

External contacts

Typical experience

3-4+ years experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title: Senior Banker - Business
Position code: Aon.BCC.BB101.5
Level: 5

Responsible for

Servicing a number of key SME clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Bankers/Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans.
- Reviewing existing client portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority
- Planning individual development plans for key customers.
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets and future growth potential.
- Effective negotiation and communication skills and developing management skills.
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities.
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Key Clients at all levels.

Typical experience

7+ years experience within an Banking Sales/Business Development role, coupled with undergraduate qualifications major in Finance.

Other comments

Alternative Title: Senior Account Manager

Position Description

Position title: Banker - Business
Position code: Aon.BCC.BB101.4
Level: 4

Responsible for

Servicing a number of SME clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager or Senior Business Banker

Supervises

May Supervise Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Where appropriate, providing service to intermediaries, for example new business portfolio, renewal negotiations, acceptance and authorisation of lending.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business
- Accepting business within risk acceptance authority and referring risks in excess of their authority to the Regional Sales Manager
- Planning individual portfolio management for key customers
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4 - 5+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative Title: Account Manager

Position Description

Position title: Senior Associate - Business
Position code: Aon.BCC.BB101.3
Level: 3

Responsible for

Servicing a number of SME clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager, Business Banking, or Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business.<new line.>Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

3+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Sales Representative/Account Manager

Position Description

Position title: Analyst - Business
Position code: Aon.BCC.BB110.3
Level: 3

Responsible for

Providing quantitative Research and information to facilitate informed business decisions.

Report to

Regional Manager, Business Banking, or Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Business Bankers

External contacts

Typical experience

3-4+ years commercial experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title: Senior Banker - Commercial
Position code: Aon.BCC.CM301.5
Level: 5

Responsible for

Servicing a number of key clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Bankers/Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans.
- Reviewing existing client portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority
- Planning individual development plans for key customers.
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets and future growth potential.
- Effective negotiation and communication skills and developing management skills.
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities.
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Key Clients at all levels.

Typical experience

7+ years experience within an Banking Sales/Business Development role, coupled with undergraduate qualifications major in Finance.

Other comments

Alternative titles: Senior Account Manager, Senior Relationship Manager - Commercial

Position Description

Position title: Banker - Commercial
Position code: Aon.BCC.CM301.4
Level: 4

Responsible for

Servicing a number of clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Where appropriate, providing service to intermediaries, for example new business portfolio, renewal negotiations, acceptance and authorisation of lending.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business
- Accepting business within risk acceptance authority and referring risks in excess of their authority to the Regional Sales Manager
- Planning individual portfolio management for key customers
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4 - 5+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative titles: Account Manager, Commercial Account Manager, Relationship Manager - Commercial

Position Description

Position title: Senior Associate - Commercial
Position code: Aon.BCC.CM301.3
Level: 3

Responsible for

Servicing a number of clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager or Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business.<new line.>Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative titles: Sales Representative, Relationship Manager

Position Description

Position title: Analyst - Commercial
Position code: Aon.BCC.CM310.3
Level: 3

Responsible for

Providing quantitative Research and information to facilitate informed business decisions.

Report to

Regional Manager or Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Business Bankers

External contacts

Typical experience

3-4+ years experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title: Director
Position code: Aon.BCC.CF401.6
Level: 6

Responsible for

Managing the operating sections within a region profitably and in accordance with the organisation's policy and procedure outline.

Report to

General Manager/Head of Business & Corporate Banking

Supervises

Corporate Banking Teams

Main activities

- Leading the activities of operating areas to achieve profit, sales and marketing plans/targets for the region.
- Assisting in the preparation of targets and objectives for the region and providing regular reporting feedback to Head Office as to actual progress to targets (budgets) outlining reasons for variances.
- Controlling the quality of services by effective direction of staff, monitoring the maintenance of correct procedures and taking corrective action.
- Approving large loans within limits of discretion.
- Maintaining and developing the personal skills of all staff in the region which includes the coordination of recruitment, training and development, performance assessment and reward.
- Being accountable for the maintenance of the organisation's policies and procedures within the region within prescribed limits of approval especially with regard to lending.
- Ensuring target rates are achieved by maintaining market intelligence, monitoring results and taking corrective action.
- Interacting with other operating and service divisions.

Key skills

- Sound management ability.
- Proven track record in achieving business targets.
- Good communication and interpersonal skills.
- Strong people management skills.

Internal contacts

Relevant staff at all levels, Support staff, Finance and Administration staff.

External contacts

Industry groups, property developers, insurers, Government departments other financial institutions.

Typical experience

Requires 10+ years extensive experience in all operating aspects. Staff management experience is essential. A professional qualification e.g.. C.P.A. may apply.

Other comments

Alternative Titles: Regional/Area Manager - Commercial Operations, District Manager - Commercial Finance, Client Director

Position Description

Position title: Associate Director
Position code: Aon.BCC.CF401.5
Level: 5

Responsible for

Servicing a number of key clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Director - Corporate Banking

Supervises

May Supervise Business Bankers/Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch plans.
- Reviewing existing client portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority
- Planning individual development plans for key customers.
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets and future growth potential.
- Effective negotiation and communication skills and developing management skills.
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities.
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Key Clients at all levels.

Typical experience

7+ years experience within an Banking Sales/Business Development role, coupled with undergraduate qualifications major in Finance.

Other comments

Alternative Titles: Senior Partner, Senior Account Manager, Senior Client Relationship Manager

Position Description

Position title: Relationship Manager
Position code: Aon.BCC.CF401.4
Level: 4

Responsible for

Servicing a number of clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Regional Manager/Director - Corporate Banking

Supervises

May Supervise Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Where appropriate, providing service to intermediaries, for example new business portfolio, renewal negotiations, acceptance and authorisation of lending.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business
- Accepting business within risk acceptance authority and referring risks in excess of their authority to the Regional Sales Manager
- Planning individual portfolio management for key customers
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4 - 5+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative Titles: Business Development Manager, Account Manager, Client Relationship Manager

Position Description

Position title: Analyst - Corporate Banking/Corporate Finance/Institutional
Position code: Aon.BCC.CF412.3
Level: 3

Responsible for

Providing quantitative Research and information to facilitate informed business decisions.

Report to

Regional Manager - Corporate Banking/Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Business Bankers

External contacts

Typical experience

3-4+ years experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title: Analyst - Entry Level
Position code: Aon.BCC.CF410.2
Level: 2

Responsible for

Assisting with the service for a number of clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Business Banker

Supervises

Main activities

- Reviewing existing customer portfolios and providing commentary on strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business. Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Some knowledge of the local markets
- Developing negotiation and communication skills
- Developing relationships with customers and intermediaries and knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Typical experience

1 - 2 years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Position Description

Position title:	Regional Manager - Business Commercial & Corporate Banking
Position code:	Aon.BCC.BC101.6
Level:	6

Responsible for

Managing the operating sections within a region profitably and in accordance with the organisation's policy and procedure outline.

Report to

General Manager/ Head of Business & Corporate Banking

Supervises

Branch Managers

Main activities

- Coordinating the activities of operating branches to achieve profit, administrative, sales and marketing plans/targets for the region.
- Assisting in the preparation of targets and objectives for the region and providing regular reporting feedback to Head Office as to actual progress to targets (budgets) outlining reasons for variances.
- Controlling the quality of services by effective direction of staff, monitoring the maintenance of correct procedures and taking corrective action.
- Approving large loans within limits of discretion.
- Maintaining and developing the personal skills of all staff in the region which includes the coordination of recruitment, training and development, performance assessment and reward.
- Being accountable for the maintenance of the organisation's policies and procedures within the region within prescribed limits of approval especially with regard to lending.
- Ensuring target rates are achieved by maintaining market intelligence, monitoring results and taking corrective action.
- Interacting with other operating and service divisions.

Key skills

- Sound management ability.
- Proven track record in achieving business targets.
- Good communication and interpersonal skills.
- Strong people management skills.

Internal contacts

Relevant staff at all levels, Support staff, Finance and Administration staff.

External contacts

Industry groups, property developers, insurers, Government departments other financial institutions.

Typical experience

Requires 10+ years extensive experience in all operating aspects. Staff management experience is essential. A professional qualification e.g.. C.P.A. may apply.

Other comments

Alternative Titles: Regional Sales Manager/Area Manager - Commercial Operations, District Manager - Commercial Finance.

Position Description

Position title: Manager - Property/Equipment/Asset Finance
Position code: Aon.BCC.AF501.6
Level: 6

Responsible for

Managing the marketing and delivery of a range of specialised financial products usually of higher value to major or large clients, or through third parties.

Report to

General Manager/Head of Business & Commercial Banking

Supervises

Business Development Managers, Account Managers, Support Staff

Main activities

- Achieving departmental profit and business growth targets to contribute to attainment of sales and operational plans.
- Reviewing existing client portfolios, recommending and implementing strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority.
- Monitoring and reporting to senior management on achievement of strategic targets and budget outcomes.
- Managing all staff activities in the Property/Equipment/Asset Finance office.

Key skills

- Top sales skills, supported by excellent product knowledge, an understanding of user needs, technological developments, trends and competitive activity.
- May have specialist business knowledge.
- Strong people management skills.

Internal contacts

Product Specialists, Customer Service, Sales and Administration Staff.

External contacts

Major Clients/Customers, Credit Reference Associations.

Typical experience

Will have at least 10 years relevant experience in finance and/or selling.

Other comments

Alternative Titles: Manager, Asset Finance, Manager, Dealer Consulting.

Position Description

Position title: Business Development Manager - Property/Equipment/Asset Finance
Position code: Aon.BCC.AF501.4
Level: 4

Responsible for

Marketing a range of specialised financial products usually of higher value to major or large clients.

Report to

Manager, Property/Equipment/ Asset Finance

Supervises

May provide guidance to junior staff.

Main activities

- Achieving sales quotas for products.
- Selling to large clients/customers, often through third parties. Will often involve preparing complex lending applications.
- Analysing clients' financial circumstances and recommending appropriate financial products and services.
- Ensuring application details are provided comprehensively to assist swift processing.
- Maintaining close contact continually with major clients or third parties/dealers so as to maximise potential sales opportunities.
- Implementing marketing strategy & company procedures to maximise customer service and satisfaction.
- Continually monitoring competitor activities and offsetting these with third parties/dealers to present competitive advantage.

Key skills

- Top sales skills, supported by excellent product knowledge, an understanding of user needs, technological developments, trends and competitive activity.
- May have specialist business knowledge.

Internal contacts

Product Specialists, Customer Service, Sales and Administration Staff.

External contacts

Major Clients/Customers, Credit Reference Associations.

Typical experience

Will have at least 4-5 years relevant experience in finance and/or selling.

Other comments

Alternative Titles: Senior Sales Consultant, Senior Dealer Consultant.

Position Description

Position title: Account Manager - Property/Equipment/Asset Finance
Position code: Aon.BCC.AF501.3
Level: 3

Responsible for

Marketing a range of specialised financial products usually of higher value to major or large clients.

Report to

Business Development Manager, Property/Equipment/ Asset Finance

Supervises

No supervisory responsibilities.

Main activities

- Achieving sales quotas for products.
- Selling to allocated portfolio of clients/customers, sometimes through third parties. Preparing lending applications.
- Analysing clients' financial circumstances and recommending appropriate financial products and services.
- Ensuring application details are provided comprehensively to assist swift processing.
- Maintaining close contact continually with clients or third parties/dealers so as to maximise potential sales opportunities.
- Implementing marketing strategy & company procedures to maximise customer service and satisfaction.
- Continually monitoring competitor activities and reporting on market initiatives to assist in offsetting these with third parties/dealers to present competitive advantage.

Key skills

- Top sales skills, supported by excellent product knowledge, an understanding of user needs, technological developments, trends and competitive activity.
- May have specialist business knowledge.

Internal contacts

Product Specialists, Customer Service, Sales and Administration Staff.

External contacts

Major Clients/Customers, Credit Reference Associations.

Typical experience

Will have at least 3-4 years relevant experience in finance and/or selling.

Other comments

Alternative Titles: Sales Consultant, Dealer Consultant.

Position Description

Position title: Analyst - Property/Equipment/Asset Finance
Position code: Aon.BCC.AF510.3
Level: 3

Responsible for

Providing quantitative research and information to facilitate informed business decisions.

Report to

Regional Manager/ Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Business Bankers

External contacts

Typical experience

3-4+ years commercial experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title: Contact Centre General Manager
Position code: 49005
Level: 6

Responsible for

Lead inbound and outbound contact centre functions to deliver sales and service propositions which align with business and channel strategies, achieving customer satisfaction and financial objectives.

Report to

Customer Operations Director.

Supervises

Contact Centre Managers

Main activities

- Deliver customer service, achieving coordination of day to day operations through subordinate managers. Operating and developing the contact centre and offering service delivery to meet the needs of customers.
- Develop short and long-term plans for the contact centre delivering direction, process improvement, human resource capability and organisation support.
- Represent Customer Operations with Sales and Marketing working with business leaders to ensure support of strategies through the delivery of sales and service propositions in a tiered support environment.
- Work with managers to clearly identify and define their responsibilities, developing key performance indicators/goals to ensure effective and efficient operation of the contact centre.
- Undertake regular one to one meetings, team meetings, training and counselling/coaching sessions for all direct reports, conducting regular performance appraisals and remuneration reviews.
- Develop, manage and report on functional budgets including delegating budgetary responsibility and cost centre management to direct reports as appropriate.
- Contribute to the wider Customer Operations/Contact Centre resource and capability strategy.
- Act as a lead change agent for Customer Operations ensuring all change initiatives are planned, structured and deliver overall business objectives.

Key skills

- Proven Contact Centre management experience, including a clear understanding of Contact Centre and CRM packages and technology.
- Developed skills in planning and organising large service delivery functions.
- An ability to think and act at a strategic level.
- Financial management, including budget creation and management.
- Ability to influence customers at the highest level.
- Ability to train, motivate and provide feedback to staff in a team environment.
- Well developed negotiation, facilitation, communication and presentation skills.

Internal contacts

Customer Operations/Support Managers, Sales and Marketing management teams, Operations and Logistics Managers, Systems and Software Development staff.

External contacts

Customers at senior management level, prospects, distributors, sub-contractors and outsource suppliers.

Typical experience

At least 10+ years experience in customer service management, coupled with a relevant tertiary business qualification.

Other comments

Position Description

Position title: Contact Centre Manager
Position code: 49010
Level: 5

Responsible for

Managing Customer Centre teams to ensure efficient service to customers and advisers via telephone and correspondence inquiries.

Report to

General Manager, Customer Service.

Supervises

Contact Centre Team Leaders and Representatives.

Main activities

- Operating and developing the Contact Centre and offering service delivery to meet the needs of customers across all contact channels. Managing the daily operation of the Contact Centre to ensure service delivery standards are met and maintained in line with company defined objectives.
- Ensuring customer complaints are actioned and resolved as per Customer Service guidelines.
- Work with team managers to clearly define their responsibilities and develop key performance indicators/goals to ensure effective and efficient operation of the Contact Centre.
- Understanding the regulatory, fair trading and competition rules relating to the role enough to be able to comply with them. Seeking Specialist support where appropriate.
- Actively supporting company policy and best practice in the area of security, with particular emphasis of protection of sensitive customer information.
- Analysing performance, highlighting problem areas and identifying improvement actions.
- Driving improvement projects to improve performance against targets.
- Undertaking regular one-to-one meetings, team meetings (where feasible), training and counselling/coaching sessions for all direct reports, conducting regular performance appraisals and remuneration reviews.
- Budgetary management.
- Liaise with marketing departments regarding launch of new products/services. Manage the impact of new products and services on levels of customer service.

Key skills

- Ability to train, motivate and provide feedback to staff in a team environment.
- Negotiation, facilitation and communication skills.
- Planning and organisational skills.
- Budgetary creation and management.

Internal contacts

Senior Management.

External contacts

Clients.

Typical experience

Usually at least 5-8 years of industry experience.

Other comments

Position Description

Position title: Contact Centre Team Leader
Position code: Aon.CSP.CC101.4
Level: 4

Responsible for

Managing a team to ensure that customer and adviser contact is handled in a professional manner to assist in preserving and initiating business.

Report to

Contact Centre Manager

Supervises

Customer service consultants

Main activities

- Ensuring appropriate responses to all customer requests/queries within timeframes and service levels.
- Dealing with complex enquiries.
- Recruiting, training and developing staff.
- Helping formulate and achieve team goals.
- Reviewing procedures to ensure efficiency of operation.
- Playing an active role in considering new technologies and new work practices.
- Work with other Team Managers/Leaders to achieve centre and company objectives and liaise with those divisions providing operational support.
- Ensure delivery to call centre key performance indicators, implementing performance management programmes where necessary to ensure maximum achievement of goals and service levels.

Key skills

- Ability to train, motivate and provide feedback to staff in a team environment.
- Good facilitation and communication skills.
- Ability to plan and organise in a team environment.
- Ability to work under pressure.
- Ability to actively participate in or to lead group meetings.

Internal contacts

Workforce management, Support, Sales and Marketing

External contacts

Customers.

Typical experience

A minimum of 4-5 years experience in a Customer Service environment.

Other comments

Position Description

Position title: Senior Banking Advisor
Position code: Aon.CSP.CC107.4
Level: 4

Responsible for

Providing quality advice over the phone on the organisation's more complex product offering (such as home loans or higher levels of credit).

Report to

Contact Centre Team Leader

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Providing customers with a tailored service around an organisation's complex product offering.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer's needs.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Actively build relationships around the business that support the organisation's initiatives.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Excellent telephone skills and a customer service focus.
- Ensures accuracy and quality of work in information which meets customer and organisation expectations
- In-depth complex Product knowledge/Technical knowledge of banking systems.
- Ability to guide and motivate individuals and a group to achieve desired outcomes.

Internal contacts

Other Contact Centre and support staff

External contacts

Customers.

Typical experience

At least 4-5 years of experience in all aspects of the organisation's offering as well as the ability to present and promote the organisation's complex product line.

AFA qualification.

Other comments

Alternative Title: Senior Personal Banker

Position Description

Position title: Banking Advisor
Position code: Aon.CSP.CC107.3
Level: 3

Responsible for

Providing quality advice on the organisation's more complex product offering (such as personal loans and credit card lending).

Report to

Contact Centre Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Providing customers with a tailored service around an organisation's product offering.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer's needs.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Actively building relationships around the business that support the organisation's initiatives.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Excellent telephone skills and a customer service focus.
- Ensures accuracy and quality of work in information which meets customer and organisation expectations
- In-depth complex Product knowledge/Technical knowledge of banking systems.
- Ability to guide and motivate individuals and a group to achieve desired outcomes.

Internal contacts

Other Contact Centre and support staff

External contacts

Customers.

Typical experience

At least 3-4 years of experience in all aspects of the organisation's offering as well as the ability to present and promote the organisation's complex product line. AFA qualification.

Other comments

Alternative Title: Personal Banker

Position Description

Position title: Banking Consultant
Position code: Aon.CSP.CC101.3
Level: 3

Responsible for

Providing specialist advice (e.g. credit cards, KiwiSaver, insurance)

Report to

Contact Centre Team Leader

Supervises

May supervise Customer Service staff.

Main activities

- Providing customer service on a specialised area of services or products including account enquiries, funds transfer and account maintenance. Providing advice to both customers and Contact Centre colleagues in area of specialist knowledge. Meeting agreed service levels to provide the highest standard of customer service.
- Resolving customer complaints in a professional manner and investigating (and recommending) solutions to enable assurance to customers that problems will not re-occur.
- Identifying processes that may be streamlined to increase productivity and provide quality customer service.
- Ensuring knowledge is up-to-date on all aspects of specialisation, and providing feedback to the wider team on any issues that may impact on advice or assist in improving customer service.

Key skills

- Excellent telephone skills and a customer service focus.
- Ensures accuracy and quality of work in information which meets customer and organisation expectations
- Product knowledge/Technical knowledge of banking systems.
- Ability to guide and motivate individuals and a group to achieve desired outcomes.

Internal contacts

Other Contact Centre and support staff

External contacts

Customers.

Typical experience

At least 3-4 years of experience in all aspects of the organisation's offering as well as the ability to present and promote the organisation's complex product line.

May be working towards AFA qualification.

Other comments

Position Description

Position title: Outbound Sales Representative
Position code: Aon.CSP.CC104.2
Level: 2

Responsible for

Building long term relationships with a defined customer base to support company product promotions and customer loyalty.

Report to

Contact Centre Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Contributing to the achievement of departmental profitability and market penetration targets by maintaining regular call-cycles with allocated customer base.
- Actively building relationships by exceeding customer needs and resolving concerns or issues.
- Ensuring an understanding of their business and product/service requirements and assisting in the choice of appropriate solutions for their needs/problems.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Excellent telephone skills and a customer service focus.
- Ensures accuracy and quality of work in information which meets customer and organisation expectations
- Product knowledge/Technical knowledge of banking systems.
- Ability to guide and motivate individuals and a group to achieve desired outcomes.

Internal contacts

Other Contact Centre and support staff

External contacts

Customers.

Typical experience

At least 3-4 years of experience in all aspects of the organisation's offering as well as the ability to present and promote the organisation's complex product line.

Other comments

Position Description

Position title: Senior Customer Service Consultant
Position code: Aon.CSP.CC105.2
Level: 2

Responsible for

Providing quality customer service on Bank products and resolving satisfactorily and professionally all enquires and customer complaints.

May assist customers with specialist products (e.g. credit cards, KiwiSaver, insurance).

Report to

Contact Centre Team Leader

Supervises

May supervise Customer Service staff.

Main activities

- Providing customer service on all bank products and services including account enquiries, funds transfer and account maintenance. Meeting agreed service levels to provide the highest standard of customer service.
- Resolving customer complaints in a professional manner and investigating (and recommending) solutions to enable assurance to customers that problems will not re-occur.
- Identifying processes that may be streamlined to increase productivity and provide quality customer service.
- Providing feedback to the wider team on any issues that may assist in improving customer service.

Key skills

- Excellent telephone skills and a customer service focus.
- Ensures accuracy and quality of work in information which meets customer and organisation expectations
- Product knowledge/Technical knowledge of banking systems.
- Ability to guide and motivate individuals and a group to achieve desired outcomes.

Internal contacts

Other Contact Centre and support staff

External contacts

Customers.

Typical experience

2-3+ years front line customer service officer experience.

Other comments

Position Description

Position title: Customer Service Consultant
Position code: Aon.CSP.CC101.1
Level: 1

Responsible for

Providing quality customer service on Bank products and resolving satisfactorily and professionally all enquires and customer complaints.

Report to

Contact Centre Team Leader

Supervises

No Supervisory responsibilities.

Main activities

- Providing customer service on all bank products and services including account enquiries, funds transfer and account maintenance. Meeting agreed service levels to provide the highest standard of customer service.
- Resolving customer complaints in a professional manner and investigating (and recommending) solutions to enable assurance to customers that problems will not re-occur.
- Identifying processes that may be streamlined to increase productivity and provide quality customer service.
- Providing feedback to the wider team on any issues that may assist in improving customer service.

Key skills

- Excellent telephone skills and a customer service focus.
- Ensures accuracy and quality of work in information which meets customer and organisation expectations
- Building Product knowledge/Technical knowledge of banking systems.
- Ability to guide and motivate individuals to achieve desired outcomes.

Internal contacts

Other Contact Centre and support staff

External contacts

Customers.

Typical experience

Front line customer service officer experience.

Other comments

Position Description

Position title: Administration Manager
Position code: 15030
Level: 4

Responsible for

Managing and developing the organisation's administration policies and processes and supervising staff engaged in one or more administrative activities.

Report to

Divisional Manager/General Manager, Branch Department Manager.

Supervises

Administration staff.

Main activities

- Managing staff responsible for accounts payable/receivable.
- Recommending and initiating changes for procedures and policies.
- Overseeing import/export/foreign exchange transactions and inter-company charging.
- Processing freight charges.
- Ensuring orders are processed and stock levels are maintained.
- Cashiering and banking.
- Ensuring accuracy of statistical records/returns.
- Ensuring accuracy of ledgers.
- Coordinating the training and development of administration staff.

Key skills

- Proven management and administrative ability.
- Organisational and decision-making ability.
- Strong analytical and interpersonal skills.

Internal contacts

Divisional staff, IT staff, Internal Auditors.

External contacts

Suppliers of Business Equipment, Customers/Clients, External Auditors.

Typical experience

Will have 5-7 years relevant practical experience across a broad spectrum of administration duties. May have experience in an accounting environment.

Other comments

Position Description

Position title: Administration Team Leader
Position code: 15035
Level: 3

Responsible for

Organising and supervising staff engaged in an array of administrative duties.

Report to

Office Manager, Administration Manager or Company Secretary, Branch Department Manager.

Supervises

Administration staff.

Main activities

- Supervising staff responsible for accounts payable/receivable.
- Overseeing import/export/foreign exchange transactions and inter-company charging.
- Processing freight charges and supervising courier and mail delivery.
- Ensuring orders are processed and stock levels are maintained.
- Cashiering and banking.
- Maintaining accuracy of statistical records/returns.
- Maintaining consistency of ledgers.
- Dealing with problems, queries and complaints caused by other departments and third parties and taking appropriate action to ensure an effective resolution.
- Training and developing Administration staff.

Key skills

- Leadership and administrative ability.
- Organisational and decision making ability.
- Strong analytical and interpersonal skills.
- Ability to handle more than one task at a time.

Internal contacts

Divisional staff, IT staff, Internal Auditors.

External contacts

Suppliers of Business Equipment, Customers/Clients, External Auditors.

Typical experience

5+ years relevant practical experience across a broad spectrum of administrative duties.

Other comments

Alternative Title: Administration Supervisor.

Position Description

Position title: Administration Officer - Level 3
Position code: 15045
Level: 2

Responsible for

Providing administrative support for the organisation and internal Departments/Teams as required.

Report to

Administration Manager, Payroll Manager, Accounts Manager, Accountant, Logistics Manager, Purchasing Manager, Branch Manager, Human Resources Manager.

Supervises

No supervisory responsibilities.

Main activities

- Handling complete segments of a Department's administrative work without supervision.
- Maintaining all accounts payable/receivable, processing orders and preparing invoices.
- Processing payroll information and updating personnel records if required.
- Maintaining stock levels and maintaining associated records.
- Cashiering and banking.
- Drafting of correspondence as required.
- Collating reports and statistical information and creating PowerPoint presentations within area of assigned activity.
- Resolving discrepancies and handling difficult exceptions, recognising problem areas as they arise and making recommendations to group leader for action.
- Recommending and actioning changes for procedures and policies.

Key skills

- Good interpersonal and communication skills.
- Intermediate MS Office skills.
- Strong organisation and time management skills.
- Ability to work in a team environment.

Internal contacts

staff at all Levels.

External contacts

Suppliers of Business Equipment, Customers and Clients.

Typical experience

At least 2-4 years applicable experience in a specific functional area. High school qualifications or equivalent with course work in business curriculum.

Other comments

Position Description

Position title: Administration Officer - Level 2
Position code: 15050
Level: 2

Responsible for

Providing administrative support for the organisation and internal Departments/Teams as required.

Report to

Administration Manager, Payroll Manager, Accounts Manager, Accountant, Logistics Manager, Purchasing Manager, Branch Manager, Human Resources Manager.

Supervises

No supervisory responsibilities.

Main activities

- Handling complete segments of a Department's administrative work under minimal supervision.
- Classifying, indexing, maintaining and updating both manual and electronic filing systems.
- Maintaining all accounts payable/receivable, processing orders and preparing invoices.
- Answering incoming calls, operating switchboard, fax machine and other electronic/digital office equipment.
- Ordering stationery and office equipment supplies and keeping stock records.
- Typing correspondence.
- Organising travel and accommodation.
- Maintaining and organising the repair of all office machines and equipment.

Key skills

- Good interpersonal and communication skills.
- Intermediate MS Office skills.
- Effective organisation and time management skills.
- Efficient and accurate typing ability.
- Ability to work in a team environment.

Internal contacts

staff at all Levels.

External contacts

Suppliers of Business Equipment, Customers and Clients.

Typical experience

At least 2 years applicable work experience. High school qualifications or equivalent with course work in business curriculum.

Other comments

Position Description

Position title: Administration Officer - Level 1 - Entry Level
Position code: 15055
Level: 1

Responsible for

Providing administrative support for the organisation and internal Departments/Teams at a basic level.

Report to

Administration Manager, Payroll Manager, Accounts Manager, Accountant, Logistics Manager, Purchasing Manager, Branch Manager, Human Resources Manager.

Supervises

No supervisory responsibilities.

Main activities

- Answering incoming calls, operating switchboard, fax machine and other electronic/digital office equipment.
- Classifying, indexing, maintaining and updating both manual and electronic filing systems.
- Opening and distributing mail.
- Typing of correspondence and data entry.
- Preparing invoices and processing orders.
- Ordering stationery and equipment supplies.
- Performing messenger duties and/or collections and arranging couriers.
- Maintaining general tidiness of conference/meeting rooms and their booking register.

Key skills

- Good interpersonal and communication skills.
- Sound MS Office skills.
- Organisation and time management skills.
- Efficient and accurate typing ability.
- Ability to work in a team environment.

Internal contacts

staff at all Levels.

External contacts

Suppliers of Business Equipment, Customers and Clients.

Typical experience

High school qualifications or equivalent with course work in business curriculum an advantage although not necessary.

Other comments

This is an entry level position.

Position Description

Position title: Senior Economist
Position code: 15205
Level: 5

Responsible for

Identifying and supplying comprehensive, accurate economic analysis of the economy and indicators of future business trends to Management as well as providing analysis of past performance.

Report to

Chief Economist.

Supervises

Economists and Research Assistants.

Main activities

- Providing Management with a comprehensive analysis of the economy, financial markets and any other associated information which may influence certain operating decisions such as the setting of interest rates.
- Researching and supplying information to various departments in the organisation as to their specific requirements.
- Enhancing and developing economic analytical tools for use within the organisation.
- Providing input to the Corporate planning section.
- Preparing papers for distribution to the Branch network on matters of financial and general economic interest.

Key skills

- Analysis and interpretation skills.
- Excellent presentation skills.
- Well developed interpersonal and communication skills.
- Good knowledge of both macro and micro economic theory and its application to the real world.

Internal contacts

Specialist Support staff, Investment Specialist, Divisional Managers, department Managers.

External contacts

Statistics New Zealand, Academia, external Economic Analysts, various Government departments, Private Consultancies.

Typical experience

Will have at least 3 years experience coupled with a University degree in Economics.

Other comments

Position Description

Position title: Economist
Position code: 15200
Level: 4

Responsible for

Supplying comprehensive economic analysis of the economy and indicators of future business trends to Management as well as providing analysis of past performance.

Report to

Chief Economist.

Supervises

Research Assistants.

Main activities

- Providing Management with a comprehensive analysis of the economy, financial markets and any other associated information which may influence certain operating decisions such as the setting of interest rates.
- Researching and supplying information to various departments in the organisation as to their specific requirements.
- Enhancing and developing economic analytical tools for use within the organisation.
- Providing input to the Corporate planning section.
- Preparing papers for distribution to the Branch network on matters of financial and general economic interest.

Key skills

- Analysis and interpretation skills.
- Excellent presentation skills.
- Well developed interpersonal and communication skills.
- Good knowledge of both macro and micro economic theory and its application to the real world.

Internal contacts

Specialist Support staff, Investment Specialist, Divisional Managers, department Managers.

External contacts

Statistics New Zealand, Academia, external Economic Analysts, various Government departments, Private Consultancies.

Typical experience

Will have at least 3 years experience coupled with a University degree in Economics.

Other comments

Position Description

Position title: Facilities Manager
Position code: 15220
Level: 4

Responsible for

Providing employees with a superior work environment and efficient administrative services through cost effective management of new and existing premises - ensuring organisational fixed properties are effectively administered, presented and secured.

Report to

General Manager, Accounting Manager, Administration Manager.

Supervises

A small team of clerical staff and contract cleaners.

Main activities

- Ensuring all organisational properties are well presented and always maintained to project the organisational image and logo; continually monitoring the security facilities at all locations.
- Administering premises management by selecting new office space, liaising with architects and decorators, negotiating new property leases and rent reviews, developing and monitoring compliances.
- Assisting in the recommendation of properties for the organisation to both acquire and/or dispose.
- Negotiating maintenance contracts, providing expenditure and performance data for management, planning premises usage.
- Overseeing provision of reception facilities, general office space and storage and distribution facilities and also ensuring the effective provision and service of organisational voice communications facilities.
- Negotiating renewal of corporate insurance policies ensuring company requirements are met; managing claims processes and ongoing relationships with Insurance Brokers.
- Preparing annual capital budget and monitoring expenditure against budget.
- Providing cost effective administration of the organisation's car plan and negotiating leasing rates and associated conditions with fleet suppliers.
- Negotiating cost effective organisational travel service and managing ongoing relationships with Travel Agencies, negotiating corporate hotel rates.
- Preparing budgets and monitoring expenditure across a range of administrative/facilities items.

Key skills

- Good organisational skills.
- Excellent communication and negotiation skills.

Internal contacts

Managers and staff at all levels.

External contacts

Architects, Maintenance and Building Contractors, Local Councils, Travel Agencies, Insurance Brokers, Fleet Suppliers, Equipment Suppliers.

Typical experience

At least 5 years experience in all facets of facilities management typically stemming from a solid administrative and/or technical background.

Other comments

Position Description

Position title: Facilities Officer
Position code: 15225
Level: 1

Responsible for

Day-to-day support and maintenance of work premises.

Report to

Facilities Team Leader, Facilities Manager, Operations Manager.

Supervises

No supervisory responsibilities.

Main activities

- Maintenance of office inventory supplies.
- Ensure all meeting rooms, kitchen facilities and reception are well presented and stocked.
- Processing of mail/couriers and distribution to staff.
- Archiving records.
- Assisting with corporate events.

Key skills

- Strong customer service skills.
- Ability to prioritise and multi task.
- Working knowledge of office systems and equipment.
- Administration skills.

Internal contacts

Staff at all levels.

External contacts

Suppliers, Providers, Maintenance staff.

Typical experience

Some experience in an administration role in a Corporate environment.

Other comments

This is an entry level position.

Position Description

Position title: Company Secretary
Position code: 15085
Level: 7

Responsible for

Ensuring that the Company meets its statutory and legal obligations under the relevant legislation with special reference to its corporate activities, including subsidiary operations.

Report to

General Manager, Chief Executive Officer.

Supervises

May supervise clerical staff.

Main activities

- Preparing and arranging all Board meetings and undertaking various activities related to these meetings - ensuring compliance with all legal, statutory and corporate affairs requirements and providing specialist advise to the Board.
- Facilitating ongoing communication between the organisation and external Board members.
- Providing legal advice to management on a wide range of corporate and employment relations issues.
- Ensuring compliance and reporting requirements to statutory and third parties are accurately and timely fulfilled.
- Reviewing, summarising and advising management on corporate documentation prior to sealing.
- Controlling the Executive Share Plan, maintaining the Organisation's Share Register and controlling corporate records.
- Assisting with the year end accounting process and the preparation of the organisation's annual report.
- Ensuring that Board administration is effectively performed.
- Participating in special projects and assignments of strategic importance to the organisation.

Key skills

- Good working knowledge of relevant legislation.
- Excellent communication skills.
- Excellent negotiation and dispute resolution skills.

Internal contacts

All Divisional Managers, Legal staff.

External contacts

Shareholders, External Directors, Solicitors and other Legal Advisors.

Typical experience

At least 5 years experience as a lawyer within commercial/corporate law. Degree qualified in law, economics and/or accounting.

Other comments

Position Description

Position title: Legal Counsel
Position code: 15090
Level: 5

Responsible for

Partnering with the business by providing legal expertise towards commercial decision making and ensuring that all operations of the organisation are compliant with relevant legislation.

Report to

Group Counsel, Chief Financial Officer, Chief Executive Officer.

Supervises

Depending on the structure of the organisation, employees in this role may be individual contributors with no supervisory responsibilities, or they may supervise Legal Officers, Paralegal staff, Legal Secretary and/or Contracts Administration staff.

Main activities

- Providing advice to Senior Executives and Directors on legal aspects of their defined areas, playing an integral role in the ongoing success of the organisation.
- Interpreting legal documentation and advising management on the most appropriate course of action.
- Drafting court documents and appearing in court (where applicable) to represent the organisation and/or briefing external counsel on legal issues relating to the organisation.
- Preparing and authorising security documents in major loans; advising staff on relevant procedures in non-routine security.
- Negotiating major contracts on behalf of the organisation.
- Analysing the organisation's legal and corporate risk, and offering alternatives and recommendations as required.
- Researching all legislation affecting the organisation and ensuring that relevant departments within the organisation are informed of new or proposed legislation and policy.
- Liaising with government officials on matter that effect the organisation's present and future activities.
- Some employees may manage, lead and mentor a team.

Key skills

- Extensive knowledge of all law relevant to the organisation's operations.
- Analysis and interpretation skills.
- Superior negotiation skills.
- Excellent written and verbal communication skills.
- Team leading and management skills (if applicable).

Internal contacts

Senior Executive, Business Unit, Divisional and Line Managers.

External contacts

External Legal Counsel, Government Bodies, Industry associations, Stock Exchange Employees.

Typical experience

8+ years of Legal Counsel experience, coupled with relevant tertiary qualifications and registration.

Other comments

Alternative Titles: Legal Affairs Manager; Solicitor; Corporate Legal Counsel; Legal Practitioner.

Position Description

Position title: Senior Solicitor
Position code: 15095
Level: 4

Responsible for

Providing legal advice in relation to all matters affecting the organisation and representing the organisation where appropriate.

Report to

Group Counsel, Legal Affairs Manager.

Supervises

Typically no supervisory responsibilities.

Main activities

- Operating across all parts of the business through the provision of advice to Executives and Directors on legal aspects of their defined areas, playing an integral role in the ongoing success of the organisation.
- Interpreting legal documentation and advising management on the most appropriate course of action.
- Drafting court documents.
- Appearing in court to represent the organisation and briefing external counsel on legal issues that fall outside of their realm.
- Negotiating major contracts on behalf of the organisation.
- Analysing the organisation's legal and corporate risk and offering alternatives and recommendations as required.
- Ensuring the organisation is informed of new or proposed legislation and policy.
- Liaising with government officials and having some responsibility for company secretarial and compliance matters.
- Leading and mentoring more junior solicitors.

Key skills

- Extensive knowledge of Corporations Law, NZX & ASX Listing Rules, FSR, Privacy Act, Intellectual Property Law, Industrial Relations Law, Employment Law and Trade Practices Law.
- Experience with corporate mergers and acquisitions and general transaction exposure.
- Superior negotiation skills.
- Excellent written and verbal communication skills.
- High level of attention to detail.
- Pro-active approach.

Internal contacts

Management.

External contacts

External Solicitors and Appraisers, Stock Exchange Employees.

Typical experience

At least 5-8 years experience as a Corporate Lawyer, coupled with a Bachelor of Laws and a Business, Accounting or Economics degree.

Other comments

Position Description

Position title: Solicitor
Position code: 15100
Level: 3

Responsible for

Researching and advising on legislation affecting the organisation.

Report to

Solicitor/Legal Affairs Manager, Group Counsel.

Supervises

No supervisory responsibilities.

Main activities

- Researching and reporting on legislation and its effect across all parts of the business through the provision of advice to Executives and Directors on legal aspects of their defined areas and their activities.
- Interpreting legal documentation and advising management on the most appropriate course of action.
- Drafting court documents.
- Assisting in briefing sessions with external counsel and representing the organisation in legal disputes where necessary.
- Ensuring the organisation is informed of new or proposed legislation and policy.
- Analysing the organisation's legal and corporate risk, and offering alternatives and recommendations as required.

Key skills

- Knowledge of Corporations Law, Employment Law and Trade Practices Law.
- Exposure to corporate mergers, acquisitions and general transactions.
- Effective negotiation skills.
- Good written and verbal communication skills.
- Attention to detail.

Internal contacts

Management, Solicitors.

External contacts

Solicitors/Lawyers.

Typical experience

At least 2-5 years experience as a Corporate Lawyer coupled with a Bachelor of Law and Business, Accounting or Economics Degree.

Other comments

Position Description

Position title: Compliance Manager
Position code: 15120
Level: 5

Responsible for

Establishing and implementing Compliance policies and procedures to ensure the organisation operates within legal and regulatory requirements.

Report to

General Manager, Manager - Legal and Compliance.

Supervises

A team of Compliance Specialists.

Main activities

- Ensuring Compliance with trust, legal and regulatory requirements.
- Coordinating the preparation and submission of reports in relation to the status of Compliance.
- Advising Managers and the Legal department on areas of non-compliance.
- Maintaining effective liaison with relevant regulators.

Key skills

- In-depth understanding of the legal and regulatory environment impacting on the organisation.
- High level skills in written and oral communications.
- Excellent analytical and report writing skills.

Internal contacts

Legal, General Manager, other department Managers.

External contacts

Relevant Industry and Government bodies, external Consultants.

Typical experience

At least 8-10 years of industry experience, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Senior Compliance Officer
Position code: 15125
Level: 4

Responsible for

Providing specialist technical advice to a particular business function in the development and ongoing maintenance of the Compliance Program.

Report to

Compliance Manager.

Supervises

Typically no supervisory responsibilities although may mentor junior Compliance Officers.

Main activities

- Promoting and participating in the development of a high quality Compliance Program and the necessary training.
- Assisting in the identification, preparation and development of appropriate training materials.
- Identifying risk areas and facilitating means to remove or better manage those areas by providing Compliance advice.

Key skills

- Excellent understanding of company's Compliance program.
- Good knowledge of regulation and legislation affecting company.
- Reasonable knowledge of company's policy and procedures.

Internal contacts

Legal, Managers and staff.

External contacts

Assessors/Investigators and solicitors.

Typical experience

5+ years of business experience coupled with a Legal or Business Degree.

Other comments

Position Description

Position title: Compliance Officer
Position code: 15130
Level: 2

Responsible for

Assisting in implementing compliance policies and procedures.

Report to

Compliance Manager.

Supervises

No supervisory responsibilities.

Main activities

- Monitoring organisational operations and providing information regarding their compliance to legal and regulatory requirements.
- Contributing to the production of reports relating to the status of compliance.
- Reporting to management on potential breaches.
- Undertaking compliance projects under the guidance of the Compliance Manager.

Key skills

- Good understanding of the legal and regulatory environment impacting on the organisation.
- Well developed skills in written and oral communication.
- Analytical and report writing skills.

Internal contacts

Internal Auditor, General Manager.

External contacts

Relevant Industry Associations.

Typical experience

Typical tertiary level qualifications in a related field with at least 2-4 years of industry experience.

Other comments

Position Description

Position title: Manager - Special Projects
Position code: 15070
Level: 5

Responsible for

Managing and overseeing special projects that address significant changes and developments that can effect either one business unit or the entire organisation.

Report to

General Manager.

Supervises

Project Team consisting of Specialists, team members and planning/administration staff.

Main activities

- Developing project budget from project and resource plans, managing project through development and implementation stages according to budget.
- Designing and developing strategies and processes, in consultation with team members/stakeholders/business consultants, which will support the implementation of the project.
- Reviewing and responding to corporate policy issues, providing advice and establishing policies when required.
- Identifying key stakeholders and working pro actively to gain their support and endorsement by establishing contacts, conducting presentations/workshops and attending stakeholder meetings.
- Determining project resourcing requirements, recruiting staff and managing development and implementation of project on a day to day basis.
- Identifying risks effecting delivery of project outcomes and where necessary deploys contingencies to ensure completion of project.
- Identifying project dependencies and working with relevant departments to ensure plans can be carried out effectively and dependencies are resolved.
- Developing and managing regular project plan progress reports.
- Representing or having involvement with corporate projects, committees, change management programs as required.

Key skills

- Understanding of operations, procedures and policies related to the specific business area.
- Excellent communicator, with strong facilitation and conflict resolution skills.
- Project management skills and experience.
- Process re-engineering/business improvement/change management.

Internal contacts

Executive Management. Business Unit Managers and other Project Stakeholder staff.

External contacts

Consultants, Suppliers, Clients.

Typical experience

At least 5 years industry experience at a senior management level together with relevant tertiary education in a business related discipline.

Other comments

Position Description

Position title: Project Planning Specialist
Position code: 15075
Level: 4

Responsible for

Leads project planning, scheduling, monitoring and reporting activities for projects to facilitate completion on time and within budget.

Report to

Project Manager

Supervises

No supervisory responsibilities.

Main activities

- Monitors project plans for compliance to time frames and budget.
- Coordinates project plan activities and meetings with the project manager and other members of the project team to ensure accountability, compliance and the timely, successful completion of tasks.
- Documents, justifies and explains variances when budget or project plan timeframes are not met and assists with identification/evaluation of alternatives.
- Develops project controls and reporting procedures and trains project team on application of procedures.
- Prepares summaries and recommendations on relevant projects for management.

Key skills

- Strong project and time management skills.
- Knowledge of relevant project planning software
- Excellent documentation and organisational skills.

Internal contacts

Project Manager, Project Team Members, Line Managers throughout organisation.

External contacts

Usually no external contacts

Typical experience

At least 2 years experience in a project oriented environment.

Other comments

This position may be found across a number of different business units and would report into various managers. Alternative Title: Business Analyst.

Position Description

Position title: Project Team Leader
Position code: 15080
Level: 4

Responsible for

Planning, organising and technically leading and controlling the completion of a key component of a development project.

Report to

Project Manager.

Supervises

Team of Development employees.

Main activities

- Coordinating documentation, design and development of projects.
- Controlling project schedules and ensuring that applications programs are delivered within given timeframes, meet user requirements, and are easily maintainable.
- Estimating, scheduling and planning resources for the allocated component of a project.
- Ensuring maximum levels of productivity are achieved and maintained by individuals within project team.
- Reporting on the progress of development modules against project timeframes, milestones and budget.
- Mentoring the team and providing 'hands-on' technical leadership as required.
- Providing support and consultative advice to the Project Manager.
- Ensuring all employees within the team obtain the necessary level of training.

Key skills

- Proven project leadership and technical leadership skills.
- Developing project management ability.
- Ability to translate user needs into a technical solution.
- Good experience in people management and mentoring of development employees.
- Strong interpersonal and communication skills.

Internal contacts

User Groups, Finance, IT, Administration, Project Office

External contacts

Contractors, Consultants and Vendors

Typical experience

At least 5 years of experience, with at least 3 years in a team leadership capacity. Typically will have tertiary qualification.

Other comments

Alternative Title: Team Leader, Project Lead/Leader.

Position Description

Position title: Project Coordinator
Position code: 15081
Level: 3

Responsible for

Assisting with the planning, organising and delivery of a development/business project.

Report to

Project Manager, Project Team Leader

Supervises

Main activities

- Coordinating documentation, design and development
- Coordinating project schedules and helping ensure that projects are delivered within given timeframes, meet user requirements, and are easily maintainable.
- Assisting with estimating, scheduling and planning resources for the allocated component of a development project.
- Assisting project team to deliver maximum levels of productivity.
- Assisting with the reporting on the progress against project timeframes, milestones and budget.
- Providing support for the project team

Key skills

- In depth knowledge of documentation, coding and testing across several different development languages.
- Proven project leadership and technical leadership skills.
- Developing project management ability.
- Ability to translate user needs into a technical solution.
- Good experience in people management and mentoring of development employees.
- Strong interpersonal and communication skills.

Internal contacts

User Groups, Finance, Administration, Project Office and IT.

External contacts

Contractors, Consultants, Vendors

Typical experience

At least 1-2 years of experience

Other comments

Alternative Title: Project Analyst

Position Description

Position title: Divisional Manager - Risk Management
Position code: 15135
Level: 5

Responsible for

Coordinating, monitoring and driving the Risk Management process.

Report to

Head of Financial Services.

Supervises

Risk Management Analysts.

Main activities

- Developing the Risk Management framework, charter, policy statements and methodology, ensuring it is aligned with best practice.
- Assisting the Board of Directors and Senior Management to discharge their Risk Management responsibilities and obligations under NZX listing rules and RBNZ requirements.
- Providing independent reports to the Board Audit Committee and Risk Management Committee with respect to the overall progress of Risk Management in the organisation.
- Establishing focus groups to drive the awareness and management of significant Risks in the organisation, ensuring Management and staff are suitably equipped to cope with the growing complexity of Risk across the organisation's operations.
- Assessing and evaluating operational policies and procedures to achieve the identified Risk Management objectives and recommend improvements where necessary.
- Introducing new technology, improved Risk Management techniques and approaches to assist risk identification, measurement and control.
- Facilitating and coordinating business unit documentation of operational policies and procedures.
- Monitoring the progress of risk management processes on existing and new projects/activities undertaken by the organisation.
- Serving as a reference point to managers on Risk Management issues.

Key skills

- Ability to work closely with department Managers.

Internal contacts

All departments throughout the bank, Risk Management Committee.

External contacts

Consultants.

Typical experience

10+ years understanding Risks of an organisation coupled with relevant tertiary qualifications. An audit background is an advantage.

Other comments

Position Description

Position title: Senior Risk Management Analyst
Position code: 15140
Level: 4

Responsible for

Analysing, monitoring and reporting on the Consumer and Commercial portfolio, recommending credit policy changes, and identifying opportunities for risk containment and revenue enhancement.

Report to

Divisional Manager/National Credit Quality Manager.

Supervises

May supervise more junior Risk Management Analysts.

Main activities

- Monitoring quality and profitability for major portfolio segments, quantifying and recommending opportunities to senior management for enhancing revenue and/or containing risk.
- Performing analysis using credit risk tools available, and summarising findings to senior management in a clear and concise format after determining statistically significant and insignificant patterns.
- Assisting the National Credit Quality Manager in the planning, development and execution of credit risk policies and procedures.
- Participating in both long term and short term projects as assigned with responsibilities including project definition, design, data assembly, analysis, interpretation and presentation of results including recommendations.
- Driving the ongoing credit policy review of a function, tracking results of risk management strategies and recommending policy changes based on analysis of profitability, risk and operational impact.

Key skills

- Strong analytical skills.
- Superior interpersonal communication and writing skills.
- Ability to operate simultaneously at the micro and macro levels.
- High level proficiency in various software and programming packages.

Internal contacts

Lending staff, Legal department.

External contacts

Limited external contact.

Typical experience

Tertiary qualifications or equivalent (mathematics, operations research, statistics or business), coupled with a minimum of 3-5 years prior experience in an operational credit area and some supervisory experience.

Other comments

Alternative Title: Senior Credit Risk Analyst.

Position Description

Position title: Risk Management Analyst
Position code: 15145
Level: 3

Responsible for

Analysing, monitoring and reporting the Consumer and Commercial portfolios in order to identify opportunities and recommend changes in Risk Management.

Report to

Manager - Risk Management, Senior Risk Management Analyst.

Supervises

No supervisory responsibilities.

Main activities

- Monitoring major portfolio segments using credit risk tools, with the purpose of presenting findings and recommendations enabling Senior Management to contain risk, improve processes and enhance revenue.
- Performing monthly analysis of various processes including: lending, collections, marketing and behavioural scoring models and summarising findings to Senior Management in a clear and concise format after determining statistically significant patterns.
- Participating in both long term and short term projects as assigned with responsibilities including project definition, design, data assembly, analysis, interpretation and presentation of results including recommendations.
- Monitoring and developing behavioural scoring strategies.
- Assisting in the development/refinement of credit risk tools, profitability and forecasting models.
- Performing other projects or special assignments as required.

Key skills

- Good analytical skills.
- Excellent interpersonal and communication skills.

Internal contacts

Lending staff, Legal department.

External contacts

Limited external contact.

Typical experience

Tertiary qualifications or equivalent in Mathematics, Operations Research, Statistics or Business, coupled with 1+ years experience in an Operational Credit area.

Other comments

Alternative Title: Credit Risk Analyst.

Position Description

Position title:	Personal Assistant to Senior Executive(s)
Position code:	15010
Level:	3

Responsible for

Providing secretarial and administrative support exclusively to Senior Executive/s whilst maintaining a high level of discretion.

Report to

Senior Executive/s.

Supervises

May supervise other Personal Assistants/Administrators.

Main activities

- Producing correspondence, memoranda, presentations and reports both of a general and confidential nature on behalf of Senior Executive/s.
- Organising business appointments and travel arrangements for Senior Executive/s.
- Screening telephone calls, fielding inquires and requests and escalating urgent matters for Senior Executive's attention.
- Managing a Senior Executive's diary and some personal matters on his/her behalf.
- Communicating with the organisation's Executives, Executives of external organisations, Board members, suppliers and clients on behalf of Senior Executive/s.
- Coordinating the organisation of business functions, lunches and dinners.
- Supporting other Senior Executive/s when required.

Key skills

- Strong interpersonal, communication and negotiation skills.
- Exceptional corporate presentation and excellent people management skills.
- Ability to work autonomously, employ initiative to find solutions, prioritise and exercise discretion.
- Excellent organisational and administration skills.
- A proactive and flexible approach to work.
- Ability to liaise at an executive level and to work under pressure.

Internal contacts

Board Members and staff at all levels.

External contacts

Clients, Senior Executives from other organisations, Suppliers.

Typical experience

At least 5 years of experience as a Personal Assistant. Employees in this role may have completed relevant administrative qualifications.

Other comments

Position Description

Position title: Personal Assistant
Position code: 15015
Level: 2

Responsible for

Providing secretarial and administrative support to a team of Managers and Executives.

Report to

Senior Executive/s.

Supervises

No supervisory responsibilities.

Main activities

- Producing correspondence, memoranda, presentations and reports both of a general and confidential nature on behalf of a team of Executives/Managers.
- Organising business appointments and travel arrangements for a team of Executives/Managers.
- Screening telephone calls, fielding inquires and requests and escalating urgent matters.
- Coordinating the organisation of business functions, lunches and dinners.
- Managing a team of Executives/Managers' diaries to make/coordinate appointments, book rooms and notify attendees.
- Maintaining effective hard and soft copy filing systems.
- Ordering software, supplies and stationery and maintaining consumables stock for the team.
- Adhering to the organisation's administration policies.
- Providing PC application assistance to Executives/Managers as required.

Key skills

- Strong interpersonal, communication and negotiation skills.
- A proactive and flexible approach to work.
- Ability to work autonomously, employ initiative to find solutions, prioritise and exercise discretion.
- Excellent organisational and administration skills.
- Ability to liaise at an executive level, work under pressure and multi-task.

Internal contacts

Board Members and staff at all levels.

External contacts

Clients, Senior Executives from other organisations, Suppliers.

Typical experience

At least 2 years of experience as a Personal Assistant. Employees in this role may have completed a relevant administrative qualification.

Other comments

Alternative Title: Secretary.

Position Description

Position title: Receptionist/Telephonist
Position code: 15020
Level: 1

Responsible for

Answering and directing general telephone inquiries and directing visitors to the appropriate employees within the organisation.

Report to

Administration Manager.

Supervises

No supervisory responsibilities.

Main activities

- Operating a telephone switchboard and handling incoming calls - both internal and external to the organisation.
- Placing outgoing international calls for employees not authorised to make such calls direct from their personal phone connection.
- Recording and distributing incoming messages and dealing with some telephone inquiries.
- Receiving visitors to the organisation and directing them accordingly.
- Performing some routine word processing and/or clerical functions such as filing and general correspondence.
- Opening, sorting and distributing incoming mail, facsimile messages and other deliveries.
- Packaging and arranging outgoing courier deliveries.
- Maintaining the general tidiness of the reception area and associated conference/meeting rooms and their booking registers.

Key skills

- Highly organised with the ability to juggle multiple tasks.
- Excellent personal presentation skills.
- Excellent communication (both written and verbal) skills.
- Computer literacy with basic PC and administration skills.
- Ability to greet clients in a friendly and courteous manner.

Internal contacts

Almost all organisational employees.

External contacts

All incoming visitors.

Typical experience

At least one year of relevant experience operating a switchboard coupled with high school qualifications.

Other comments

Position Description

Position title: Strategy Manager
Position code: 15400
Level: 5

Responsible for

Providing strategic insights via the use of predictive models to drive segmentation and support various divisions

Report to

Head of Corporate Strategy

Supervises

Strategy Analysts

Main activities

- Ensuring the organisation has a solid understanding of customers and the market through the use of analytics & modelling in order to identify marketing opportunities.
- Overseeing the analysis of information using computerised statistical/data analysis techniques, and developing sophisticated models that support the marketing group's requirements.
- Ensuring that market and customer insights are effectively utilised to drive the translation of customer and segment knowledge into strategic and tactical recommendations for product development, customer acquisition and retention.
- Facilitating the timely and accurate delivery of campaign data to support marketing campaigns.
- Understanding the needs of the marketing group, recommending solutions, forecasting the capital costs and benefits and managing the delivery of these initiatives.
- Strategic development of the data warehouse platform to provide effective management, predictive models, business intelligence layers, reporting cubes and data capture.
- Leading and developing a team of analysts to build organisational capabilities in the use of data mining tools and ensuring a high level of accuracy and productivity within the team.

Key skills

- Excellent planning and organisational skills.
- Superior written and verbal communication and presentation skills.
- Strong reporting and analytical skills.
- Ability to communicate effectively with a wide range of stakeholders and articulate technical issues in business language to non technical audiences.
- Skilled in financial assessment and business case development.
- Ability to work in a fast paced environment and manage a number of projects simultaneously and to tight deadlines.
- Leadership and people management skills.
- Ability to liaise confidently and effectively at all levels both internally and with external vendors.

Internal contacts

Business Managers, Sales & Marketing Team, Strategy, Commercial and IT.

External contacts

Typical experience

At least 5 years professional experience in a marketing environment, including proven project management experience, coupled with a relevant tertiary qualification. Industry-specific experience and post graduate qualifications are desirable.

Other comments

Position Description

Position title: Senior Strategy Analyst
Position code: 15405
Level: 4

Responsible for

Provides input into business decisions through financial and non- financial analysis and using specialised models. Uses persuasion and recommends tactics with data analysis for business units to meet the organisations' objectives.

Report to

Strategy Manager

Supervises

May mentor a Strategy Analyst

Main activities

- Takes senior role and leads the strategic planning process and on internal consulting projects focused on the division's key business priorities.
- Analyses qualitative and quantitative data through interviews and research to identify trends/opportunities, develops conclusions from market information and creates compelling market analysis presentations.
- Usually works as a part of a team and can works with minimal guidance
- Formulates actionable, value-adding business solutions and participating in their implementation
- Uses quantitative and communication skills; strongly collaborative.
- Can make inferences from complex data and secondary sources.

Key skills

- Solid knowledge of Excel and Powerpoint
- Strong strategic mindset with sound analytical, financial modelling and planning skills
- Proactive with a strong bias toward action
- Strong communication skills: adept at influencing and persuading others
- Solid communication skills: report writing, summary commentary

Internal contacts

All divisions

External contacts

Typical experience

Bachelor's degree and may have an accounting/finance background; 2-4 years experience in a strategy role or 5+ years with relevant analyst experience

Other comments

Position Description

Position title: Strategy Analyst
Position code: 15410
Level: 3

Responsible for

Provides input into business decisions through financial and non- financial analysis and using specialised models. Uses persuasion and recommends tactics with data analysis for business units to meet the organisations' objectives.

Report to

Strategy Manager

Supervises

No supervisory responsibilities.

Main activities

- Provides analytic support during the strategic planning process and on internal consulting projects focused on the division's key business priorities.
- Gathers and analyses qualitative and quantitative data through interviews and research to identify trends/opportunities, develops conclusions from market information and creates compelling market analysis presentations.
- Usually works as a part of a team and can work with a moderate level of guidance
- Formulates actionable, value-adding business solutions and participating in their implementation
- Uses quantitative and communication skills; strongly collaborative.
- Can make inferences from complex data and secondary sources.

Key skills

- Solid knowledge of Excel and Powerpoint
- Strong strategic mindset with sound analytical, financial modelling and planning skills
- Proactive with a strong bias toward action
- Strong communication skills: adept at influencing and persuading others
- Solid communication skills: report writing, summary commentary

Internal contacts

All divisions

External contacts

Typical experience

Bachelor's degree and may have an accounting/finance background; 2-4 years analyst experience

Other comments

Position Description

Position title: Chief Executive Officer
Position code: 10005
Level: 8

Responsible for

Achieving corporate objectives and effectively managing a company or a group of companies. Ensuring that agreed strategies are implemented. Accountable under the Companies Act for the statutory compliance of all business activities of the company.

Report to

Board of Directors (and Shareholders) or Overseas Principals.

Supervises

Directors, divisional and functional Managers.

Main activities

- Submitting business forecasts and budgets for the consideration of the Board and recommending major policy changes and developments.
- Monitoring and directing overall operations to achieve revenue and expense budgets and the satisfactory performance of the various profit centres across the organisation.
- Directing the preparation, communication, and execution of operating objectives, plans and programs.
- Negotiating major deals and financial arrangements, loan terms etc.
- Directing and motivating the executive team in the achievement of agreed goals and standards.
- Acting as the chief spokesperson for the organisation.

Key skills

- Sound leadership skills and a proven record of successful staff management. Must be an effective manager by exception.

Internal contacts

Functional and divisional managers, and all subordinate staff. Fellow directors on board/policy making management team.

External contacts

Industry associations, company bankers, other financial institutions both local and overseas, Government officials, major customers/clients, shareholders, major suppliers, legal firms, and the media.

Typical experience

Over 15 years general experience in all aspects of management at a senior level including functional areas such as Administration, HR, Marketing and Finance and coordination of multi-functional activities. Tertiary qualifications and management training.

Other comments

Position Description

Position title: Chief Operating Officer
Position code: 10010
Level: 7

Responsible for

Directing and managing all operational activities of the organisation and ensuring the implementation of overall organisational strategy.

Report to

Chief Executive/Managing Director.

Supervises

All operational Managers/general Managers and staff working within the operational functions of the organisation.

Main activities

- Providing strategic direction, leading, managing and directing all operational activities of the organisation.
- Accountability for the overall profitability of the operational activities of the organisation.
- Ensuring all corporate and business unit strategies and plans are aligned, reviewed and successfully implemented - taking remedial action where necessary.
- Building relationships between the operations and support divisions and ensuring the business units receive adequate operational support.
- Providing support and assistance to the Chief Executive Officer on corporate and group issues where required.
- Communicating with the Chief Executive Officer to ensure he/she remains fully informed of all significant operating issues.
- Acting, as required or in the absence of the Chief Executive Officer, as the chief spokesperson for the organisation.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional employees.

Key skills

- Proven management experience at a senior level.
- Financial management/reporting and analysis skills.
- Strategic planning and resource management skills.
- Strong leadership and motivational ability.

Internal contacts

Functional and divisional managers and all Subordinate staff, board of directors, other members of the Executive and Senior Management teams, corporate support functions, all levels of employees.

External contacts

Major suppliers and clients/customers, Government departments and authorities, legal advisers, auditors, and the media (where necessary).

Typical experience

At least 10-12 years relevant management and operational experience coupled with tertiary level qualifications.

Other comments

Position Description

Position title: Chief Risk Officer
Position code: 10120
Level: 7

Responsible for

Overseeing the execution of the risk management systems within the organisation. Managing and effectively executing a balance between risk and commercial regulatory requirements, commercial reward, advice and independent regulatory obligations.

Report to

Chief Executive Officer/Managing Director

Supervises

Main activities

- To translate the overall business strategy into a business plan and to deliver the financial, regulatory and technical objectives to achieve approved business plan.
- Provide advice to Executives on the management of regulatory changes within the Industry.
- Initiate, research and sponsor business improvement activities that promote superior service delivery and optimal resource allocation across distribution and support business units.
- Identify relevant change requirements within and across the business units and ensure execution of change is successful with consideration to legislation, people impacts and business requirements.
- Responsible for the overall maintenance of standards, policies and procedures which ensure regulatory compliance.
- Provide strong governance across functions such as Product, Actuarial, Risk & Business Analytics, Reinsurance, and Legal, Customer Relations, Fraud, Compliance & Governance functions to ensure legislative responsibilities are met, and internal controls are maintained.
- Manage statutory and Board reporting requirements to rigorously monitor and measure the Company's position, and support Executive decision making process.
- Responsible for the overall management of all functions supporting the office of the CRO.

Key skills

- Strong communication, influencing and negotiation skills.
- Ability to build effective relationships with senior managers and other key stakeholders.
- High impact presentation skills, demonstrated leadership skills and the ability to think strategically.

Internal contacts

Product, Actuarial, Risk & Business Analytics, Reinsurance, Legal, Customer Relations, Fraud, Compliance & Governance.

External contacts

Typical experience

At least 10 years operations experience, with audit, accountancy or actuarial experience coupled with a relevant tertiary education.

Other comments

Position Description

Position title: Sales Director
Position code: 10035
Level: 7

Responsible for

Establishing and controlling the national sales strategy and Sales force to achieve revenue and expense targets.

Report to

Chief Executive/Managing Director.

Supervises

A national Sales force, including Region or Area Sales Managers, Product Specialists and Sales Representatives.

Main activities

- Negotiating major deals and maintaining key customer contacts at senior levels.
- Working with other relevant Managers to develop national sales strategy.
- Monitoring sales and expense performance and initiating corrective action where necessary.
- Developing budget and regularly reporting actual performance to budget, with variance analyses and revised projections.
- Coordinating the gathering of market intelligence covering competitors' products and sales strategies.
- Monitoring and reporting on the performance of dealers and distribution channels.
- Recruiting, training and motivating sales staff.

Key skills

- Sound product and industry knowledge.
- Budgetary formulation and control abilities.
- Ability to negotiate complex sales at senior levels.
- Excellent planning and administrative abilities.
- Excellent motivational and persuasive skills.

Internal contacts

Marketing executives and specialists, region or branch managers/sales managers, credit, finance and human resources managers and legal officer.

External contacts

Major customers, advertising agencies and public relations firms, distributors, Government officials.

Typical experience

At least 12 years related sales/marketing experience coupled with relevant tertiary qualifications in technical/business areas.

Other comments

This role is primarily managerial requiring a sound sales background.

Position Description

Position title: Marketing Director
Position code: 10045
Level: 7

Responsible for

Establishing and controlling the national marketing strategy to achieve market share and profitability goals.

Report to

Chief Executive/Managing Director.

Supervises

A specialist marketing team, including product Managers, market research officers and product promotions staff.

Main activities

- Developing plans to achieve revenue and profit margin projections.
- Formulating national marketing policies and strategies based on market intelligence and research projections.
- Implementing and monitoring the progress of marketing plans and advertising campaigns.
- Preparing and updating national marketing budgets, regularly reporting on performance against target and providing variance analyses and revised projections.
- Determining pricing and volume discount policies.
- Coordinating market research and market intelligence data.
- Liaising with other divisions/departments.

Key skills

- Professional marketing skills are essential. The role also needs strong communicative skills and the ability to interpret and maximise the use of sophisticated market research data.

Internal contacts

National sales management, finance and accounting, company secretarial/legal, systems and software development.

External contacts

Advertising agencies, the media, public relations firms, market research firms, and Government officials.

Typical experience

At least 12 years of marketing and product management experience. Typically has tertiary qualifications.

Other comments

The role has significant elements of market strategy and positioning.

Position Description

Position title: Finance Director/Chief Financial Officer
Position code: 10055
Level: 7

Responsible for

Establishing and controlling the financial systems and administrative services of the company, and providing financial information to Chief Executive and Directors.

Report to

Chief Executive/Managing Director.

Supervises

Finance, Accounting, and Administration staff.

Main activities

- Directing the establishment of financial/accounting principles, procedures and practices in line with legal and corporate requirements.
- Ensuring accurate and timely financial reports and forecasts for the whole organisation so as to provide a clear insight into its financial condition.
- Advising on the financial implications of management decisions and establishing the financial soundness of proposed acquisitions and divestment of assets or businesses.
- Ensuring that the profits of the organisation are protected through the establishment of effective financial controls; implementing and maintaining appropriate management accounting and reporting systems, budgetary controls and expenditure procedures.
- Implementing policies to ensure the security of funds and assets, guiding the lodgement of tax and other returns to comply with all statutory requirements, and administering insurance cover and claims.

Key skills

- Requires formal qualifications and considerable practical experience in financial planning, reporting and control.
- Sound knowledge of international exchange transactions and import/export activities. The ability to organise and control major accounting systems is also required.

Internal contacts

Functional management, company secretary, internal audit, IT Manager.

External contacts

Financial institutions, major customers and suppliers, external auditors, investment advisers.

Typical experience

At least 15 years practical experience in addition to tertiary qualifications.

Other comments

The role administers and directs to meet statutory and corporate reporting requirements.

Position Description

Position title: Human Resources Director
Position code: 10065
Level: 7

Responsible for

Ensuring the most effective utilisation of the organisation's staff resources.

Report to

Chief Executive/Managing Director.

Supervises

Divisional head for each function e.g. recruitment, remuneration, training and development.

Main activities

- Developing the Human Resources contribution to the company's strategic planning so that its long term people needs are identified and accommodated within its business plans and management decisions.
- Developing, submitting for approval, and managing the implementation of Human Resource policies throughout the organisation. Policies will respond to legal requirements, minimise disruption, penalties and adverse publicity.
- Ensuring that all skills requirements within the organisation are met through ongoing workforce planning, staff development programs and external recruitment.
- Ensuring all staff administration records are effectively maintained.
- Ensuring staff reward practices take account of varying performance levels, internal equity and external salary market rates.
- Assisting management in achieving harmonious working relations with all staff thereby minimising time lost through industrial disputes.

Key skills

- Sound negotiating skills and strong interpersonal skills. Thorough knowledge of Government legislation.

Internal contacts

Chief executive officer and all functional and divisional managers.

External contacts

Specialist consultancies, legal advisers, financial institutions, union delegates.

Typical experience

Tertiary level qualifications with at least 12 years of experience in all aspects of Human Resources Management.

Other comments

Alternative Title: General Manager - Human Resources.

Position Description

Position title: Chief Information Officer
Position code: 10090
Level: 7

Responsible for

Ensuring the effective development and operation of computing and information services which support strategic operations of the organisation.

Report to

Chief Executive/Managing Director.

Supervises

Operations staff, systems development and support staff.

Main activities

- Participating in major corporate decisions, particularly where IT has a major influence on the competitive advantage and profitability of the organisation.
- Setting and controlling IT operational and development expenditures within budget.
- Developing the forecasting and planning for equipment and software purchases in relation to projected user requirements.
- Establishing and maintaining standards in relation to operations, programming and security.
- Participating in policy-making as a member of a senior management team.

Key skills

- Requires people management and leadership abilities, together with professional standards of planning and budgeting.
- Proven business and management skills.

Internal contacts

Senior Management, all User departments, Finance and Administration.

External contacts

Suppliers of non company equipment and peripherals, software suppliers and consultants.

Typical experience

At least 12 years of experience in computing, with at least 5 years in large sites with an IBM/VAX, or plug compatible environment. May have formal business training in addition to technical DP experience.

Other comments

Alternative Titles: EDP Division Manager; Chief Manager MIS.

Position Description

Position title: Head of Corporate Strategy
Position code: 10100
Level: 7

Responsible for

Developing, directing and controlling the corporate strategic planning activities of the business. Providing direction and driving delivery of a strategic plan through an inclusive strategic planning process.

Report to

Chief Executive/Managing Director.

Supervises

Strategic planning team(s), business analysts.

Main activities

- Participating as a member of the senior management/strategic team formulating company policy and approving major management changes.
- Independently reviewing and assessing business unit initiatives of a strategic nature impacting the business.
- Identifying opportunities/threats impacting the business. Analysing and recommending actions, and where appropriate implementing recommendations.
- Developing and maintaining an independent view of all markets in which the business operates in the short, medium and long-term for business planning, business development and other significant market transactions.

Key skills

- Understanding and appreciation of the financial implications of decisions and their impact.
- Ability to use the dynamics and value drivers of the business strategy to make decisions about the impact of changes.
- Ability to work within long-term time frames and anticipate and act on opportunities or problems that are likely to arise.
- Strong analytical capabilities.
- Ability to communicate at all levels of the organisation.
- Proven ability to develop corporate infrastructure, including policies procedures and systems.
- Proven ability in managing a large budget.
- Strong influencing and leadership skills.

Internal contacts

Senior Management, finance and administration, functional and divisional managers, and all subordinate staff.

External contacts

Industry associations, major customers/clients, shareholders and major suppliers.

Typical experience

10+ years experience in a senior management or general management role in a commercial environment. Tertiary qualification in economics, engineering or other quantitative field.

Other comments

Position Description

Position title: Chief Legal Counsel
Position code: 10060
Level: 7

Responsible for

Advising Senior Management on their individual and corporate legal obligations and rights so as to protect the organisation's interests. Ensuring compliance with relevant regulations, legal demands and ethical standards that affect business activities.

Report to

Chief Executive/Managing Director.

Supervises

Legal Officers, Corporate Counsel/Commercial Specialists/Business Assurance Analyst.

Main activities

- Ensuring Senior Managers/Board of Directors are kept informed of new and proposed legislation which may affect the organisation's activities, and compliance with all existing laws and government regulations. Advising on impact of Court decisions.
- Researching legislation affecting the organisation, passing advice onto relevant managers to ensure that the company operates fully within the law with special reference to its methods of business, its contractual relations and its process of negotiation.
- Advising on business acquisitions/divestments (whether assets or corporations), ensuring protection of the company's intellectual property rights (trade marks, patents, designs, copyright and confidential information) and maintaining registration and renewal of all business names.
- Identifying and briefing management on potential and actual legal exposures and taking appropriate proactive and remedial measures. Providing legal advice concerning tax, insurance, property, advertising, sales agreements and trade practices.
- Negotiating, drafting and interpreting contracts, assisting management in the early stages of negotiations with third parties, ensuring that contractual terms and conditions for supply and acquisition of products are protecting the company's interests. Reviewing/updating standard contracts and drafting additional standard contracts where required.
- Resolving legal disputes/claims and initiating/defending legal proceedings as necessary. May appear in court to represent the organisation and brief counsel on legal matters, ensuring that the organisation is effectively represented in any legal action taken against it.
- Maintaining statutory records and filing returns.

Key skills

- Excellent communication skills.
- Ability to interpret legal requirements and apply to relevant business operations.
- General managerial experience.

Internal contacts

Regulatory Affairs Manager, all Divisional and Functional Managers.

External contacts

Government Departments and Regulatory Bodies, External Solicitors and Appraisers.

Typical experience

At least 10 years relevant commercial experience coupled with a law degree. Will be a registered Solicitor.

Other comments

Alternative Titles: Group Counsel; Chief Manager, Legal Affairs. May also have Company Secretary responsibilities.

Position Description

Position title: Chief Economist
Position code: 10111
Level: 6

Responsible for

Providing economic, planning information and expertise to the Management of the organisation - especially the Funds Management divisions.

Report to

Chief Investment Officer, Divisional Manager - Investments.

Supervises

Economists, Research Officers.

Main activities

- Providing information to Management which will assist maintaining/growing a profitable mix of assets and liabilities.
- Developing and enhancing analytical tools for understanding economic indicators, such as interest rates and circulating this to management at all levels.
- Providing economic and planning expertise to Divisions including Funds Management, Treasury and Corporate Planning on matters such as the setting of interest rates.
- Providing financial projections and appraisals of foreign economies.
- Providing economic background and expertise to all Managers in the organisation thereby assisting them to become familiar with the external financial forces which regularly influence organisational policies.

Key skills

- Exceptional research and analytical skills.
- Solid knowledge of both macro and microeconomic theory and its application to the real world.
- Well developed interpersonal and communication skills.
- Excellent presentation skills.

Internal contacts

Divisional Managers, department Managers, Specialist Support staff, Investment Specialists.

External contacts

Statistics New Zealand, Academia, external Economic Analysts, various Government departments, Private Consultancies.

Typical experience

Will have at least 8 years experience couple with an advanced degree in Economics.

Other comments

Position Description

Position title: General Manager/Head of Retail Banking
Position code: Aon.EXE.RF101.7
Level: 7

Responsible for

Managing a variety of diverse functional activities or branches operating separately as autonomous profit centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas of responsibility.

Report to

Chief Executive Officer/Managing Director or Chief Operating Officer.

Supervises

Those managers and staff working within the functional areas/branches.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the multiple functions/branches in retail banking and the achievement of associated revenue and expense budgets.
- Ensuring that the functions/branches comply with senior management directives and statutory regulations.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional personnel.
- Acting as the chief spokesperson for the organisation in relation to the multi functions/branches or responsibility - as required.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Branch, sales and customer service management and staff.

External contacts

Clients/customers, suppliers, industry associations.

Typical experience

At least 12 to 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

If a person has responsibility for ALL operational activities of the organisation, please match them to position code 10010 - Chief Operating Officer. Alternative Titles: General Manager - Subsidiary Operations, Head of a Major Profit Centre.

Position Description

Position title: General Manager/Head of Business & Commercial Banking
Position code: Aon.EXE.BC101.7
Level: 7

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous profit centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas of responsibility.

Report to

Chief Executive Officer/ Managing Director or Chief Operating Officer

Supervises

Those managers and staff working within the functional areas of Business & Commercial Banking.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the multiple functions/areas and the achievement of associated revenue and expense budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional personnel.
- Acting as the chief spokesperson for the organisation in relation to the multi functions/areas of responsibility - as required.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Business & Commercial Banking Management and Teams. Sales and marketing staff, customer service and product development staff.

External contacts

Clients/customers, suppliers, industry associations.

Typical experience

At least 12 - 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

If a person has responsibility for ALL operational activities of the organisation, please match them to position code 10010 - Chief Operating Officer. Alternative Titles: General Manager - Subsidiary Operations, Head of a Major Profit Centre.

Position Description

Position title: General Manager/Head of Corporate Banking
Position code: Aon.EXE.CF101.7
Level: 7

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous profit centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas of responsibility.

Report to

Chief Executive Officer/Managing Director or Chief Operating Officer.

Supervises

Those managers and staff working within the functional areas of Corporate Banking.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the multiple functions/areas and the achievement of associated revenue and expense budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional personnel.
- Participating in the negotiation of major sales deals within broad policy guidelines - as required.
- Acting as the chief spokesperson for the organisation in relation to the multi functions/areas of responsibility - as required.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Corporate Banking Management and Teams. Sales and marketing staff, customer service and product development staff.

External contacts

Clients/customers, suppliers, industry associations.

Typical experience

At least 12 - 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

If a person has responsibility for ALL operational activities of the organisation, please match them to position code 10010 - Chief Operating Officer. Alternative Titles: General Manager - Subsidiary Operations, Head of a Major Profit Centre.

Position Description

Position title: General Manager/Head of Investment Management
Position code: Aon.EXE.IM101.7
Level: 7

Responsible for

Lead the Investment Management Team to manage the organisation/client assets to attain the best profitability and investment returns.<new line>.Overall accountability for the total portfolio outcome and growth.

Report to

Chief Executive Officer or Chief Operating Officer

Supervises

Investment Managers, Portfolio Managers, Economists

Main activities

- Leadership of Investment Management Department.
- Determining and maintaining an effective funds management plan, philosophy and guidelines for the organisation/clients.
- Preparing and communicating investment plans, targets and forecasts to management.
- Determining and maintaining effective operating procedures for managing funds within the organisation.
- Managing the professional development of employees within business unit.
- Participating as a senior member of an Investment Committee to work towards the most profitable management of funds.
- Investigating new opportunities/areas of operation within the market to improve generation of investment income.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Investment/Fund managers, Economists, Senior Management.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 12-15 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Alternative Titles: Chief Investment Officer, General Manager - Funds Management.

Position Description

Position title: General Manager/Head of Profit Centre
Position code: Aon.EXE.EX101.7
Level: 7

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous profit centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas of responsibility.

Report to

Chief Executive Officer/Managing Director or Chief Operating Officer.

Supervises

Managers and staff working within the functional areas.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the multiple functions/areas and the achievement of associated revenue and expense budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional personnel.
- Participating in the negotiation of major negotiations within broad policy guidelines - as required.
- Acting as the chief spokesperson for the organisation in relation to the multi functions/areas or responsibility - as required.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Corporate Finance Team. Sales and marketing staff, customer service and product development staff, accounts and administration staff.

External contacts

Typical experience

At least 12 to 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

Position Description

Position title: General Manager/Head of Operational or Support Function
Position code: Aon.EXE.EX201.7
Level: 7

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous operational centres. People performing this role are responsible for implementing strategy within their particular areas of responsibility.

Report to

Chief Executive Officer/Managing Director or Chief Operating Officer.

Supervises

Managers and staff working within the functional areas.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall performance of the functions/areas in Operational or Support Function, and the management of associated expense budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating managers and teams to achieve agreed targets.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Sales and marketing staff, customer service and product development staff, accounts and administration staff.

External contacts

Typical experience

At least 12 to 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

Position Description

Position title: General Manager/Head of Taxation
Position code: Aon.EXE.TX101.7
Level: 7

Responsible for

All taxation matters for the organisation at a strategic level.

Report to

CFO

Supervises

Taxation Specialist team

Main activities

- Ensuring the most effective and economic taxation policy through planning and management of the organisation's taxation liabilities, and contributing to the strategic planning process.
- Ensuring legislative and regulatory changes are acted upon, monitoring compliance and reporting on issues to senior management and the Board.
- Representing the organisation when required with regulatory and Government entities, and industry associations.

Key skills

- Accountancy and taxation qualifications. Recognised expert in taxation discipline.

Internal contacts

All departments throughout the organisation, Risk Management Committee.

External contacts

Consultants, government and other financial institutions.

Typical experience

At least 15 years of legal, compliance or applicable risk experience in a financial services environment together with relevant tertiary and post graduate qualifications.

Other comments

Position Description

Position title: General Manager/Head of (not otherwise classified)
Position code: Aon.EXE.EX301.7
Level: 7

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous operational centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas.

Report to

Chief Executive Officer/Managing Director or Chief Operating Officer.

Supervises

Managers and staff working within the functional areas.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the applicable functions/areas, and the management of associated targets and budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating managers and teams to achieve agreed targets.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Sales and marketing staff, customer service and product development staff, accounts and administration staff.

External contacts

Typical experience

At least 12 to 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

Position Description

Position title: Senior Accounts Officer
Position code: 14105
Level: 3

Responsible for

Performing the Accounts Payable and/or Accounts Receivable functions and general Accounting duties of moderate difficulty in relation to depth of analysis and use of judgment.

Report to

Financial Accountant, Office Manager.

Supervises

May mentor more junior Accounts Officers.

Main activities

- Processing more complicated functions related to Accounts Payable and/or Accounts Receivable and general Accounting duties, including invoicing, preparation and processing of cheques, payment advice, performing bank reconciliations, compiling debtor state
- Making journal or data entries and extracting statistical data and reports from records for analysis.
- Performing month end accounting procedures and producing weekly, fortnightly, monthly and quarterly reports as required.
- Maintaining records of documents processed for ready access and for producing various reports according to operating procedures.
- Preparing debtor lists, contacting clients in order to procure outstanding payments and escalating long standing/delinquent debtors to more Senior staff.
- Obtaining authorisation for payment from appropriate personnel, allocating expenditure to the correct budget account and arranging for the drawing of cheques and other forms of payment.
- Calculating the costs of proposed expenditure, wages and standard costs.

Key skills

- Sound knowledge of organisation's Accounting procedures related to work performed.
- Understanding of spreadsheets, data analysis and reconciliation procedures.
- Strong administrative and procedural skills.
- Excellent attention to detail.
- Initiative and integrity.
- Team player.

Internal contacts

Sales, Marketing, Warehouse and Distribution, Customer Support.

External contacts

Clients, Debt Collecting Agencies.

Typical experience

At least 5 years related experience and may have, or be undertaking, a formal qualification in Accounting.

Other comments

Alternative Titles: Senior Accounts Clerk; Senior Accounts Payable Officer; Senior Accounts Receivable Officer. If the primary focus of this role is Accounts Receivable, employees may be involved in Credit Control activities.

Position Description

Position title: Accounts Officer
Position code: 14110
Level: 2

Responsible for

Performing basic and routine parts of the Accounts Payable and/or Accounts Receivable functions and general Accounting duties.

Report to

Financial Accountant, Office Manager.

Supervises

No supervisory responsibilities.

Main activities

- Processing basic and routine functions related to Accounts Payable and/or Accounts Receivable and general Accounting duties, including invoicing, preparation and processing of cheques, payment advices, performing bank reconciliation's, compiling debtor statements and statutory returns, performing petty cash reconciliation's and preparing related documentation and correspondence.
- Making journal or data entries and extracting statistical data and reports from records for analysis.
- Assisting with month end accounting procedures and with the production of weekly, fortnightly, monthly and quarterly reports as required.
- Maintaining records of documents processed for ready access and producing various reports according to operating procedures.
- Preparing debtor lists, contacting clients in order to procure outstanding payments and escalating long standing/delinquent debtors to more Senior staff.
- Obtaining authorisation for payment from appropriate personnel, allocating expenditure to the correct budget account and arranging for the drawing of cheques and other forms of payment.
- Assisting in calculating the costs of proposed expenditure, wages and standard costs.

Key skills

- Growing knowledge of organisation's Accounting procedures related to work performed.
- Understanding of spreadsheets, data analysis and reconciliation procedures.
- Strong administrative and procedural skills.
- Excellent attention to detail.
- Initiative and integrity.
- Team player.

Internal contacts

Sales, Marketing, Warehouse and Distribution, Customer Support.

External contacts

Clients, Debt Collecting Agencies.

Typical experience

At least 12 months related experience and may have, or be undertaking, a formal qualification in Accounting.

Other comments

Alternative Title: Accounts Clerk, Accounts Payable Officer, Accounts Receivable Officer. If the primary focus of this role is Accounts Receivable, employees may be involved in Credit Control activities.

Position Description

Position title: Credit / Collections Manager
Position code: 14130
Level: 4

Responsible for

Maintaining organisational debtors within limits of organisation's policy and ensuring protection of an organisation's investments, minimising losses and improving recoveries.

Report to

Financial Controller, Contact Centre Operations Manager

Supervises

Credit Control Representatives, Collection Representatives.

Main activities

- Devising, maintaining and administering the organisation's credit policy so as to provide planned cash flow for the business and to minimise the organisation's exposure to risk.
- Authorising the granting of credit to selected customers within the guidelines of company policy.
- Directing and supervising the activities of the Credit Control function, ensuring both the timely collection of outstanding amounts and the maintenance of outstanding debts at acceptable levels.
- Producing accurate and timely reports to monitor accounts and recommending policy and action on bad debt and escalating outstanding debts for debt collection.
- Occasionally liaising directly with major debtors and negotiating new credit terms (in conjunction with Sales).
- Developing and maintaining relationships with relevant external organisations (e.g. Police and Bankruptcy Agencies), leading to an effective exchange of confidential information.
- Ensuring that systems documentation and procedures comply with legal/legislative requirements so as to avoid litigation and loss of income.
- Assisting in the learning and development of operational staff to maintain and improve the efficiency of credit control.

Key skills

- Ability to limit debtors and implement company credit policy.
- Negotiation and interpersonal skills.
- Strong administration and management skills.

Internal contacts

Sales Managers, Sales Representatives, Sales Administration staff, Legal department, Operational staff, Finance and Administration staff.

External contacts

Major Debtors, Debt Collection Agencies, Credit Reference Bureaus, Credit Referees, Other Financial Institutions, Solicitors, Financial Counsellors.

Typical experience

At least 7 years of relevant experience typically coupled with CPA or similarly recognised qualifications in Credit Management.

Other comments

May have a functional link to Senior Accounting employees in operating divisions.

Position Description

Position title: Credit / Collections Team Leader
Position code: 14135
Level: 3

Responsible for

Managing a team to deliver efficient and effective debt recovery and maintaining credit worthiness in a professional manner to assist in preserving and initiating business.

Report to

Credit/Collections Manager.

Supervises

Credit Control Representatives, Collection Representatives

Main activities

- Maintaining and administering the organisation's credit policy to minimise exposure to risk.
- Authorising the granting of credit to selected customers within the guidelines of company policy.
- Supervising the activities of the credit/collections team, ensuring both the timely collection of outstanding amounts and the maintenance of outstanding debts at acceptable levels.
- Ensuring that systems documentation and procedures comply with legal/legislative requirements so as to avoid litigation and loss of income.
- Recruiting, training and developing staff.
- Reviewing procedures to ensure efficiency of operation.
- Play an active role in considering new technologies and new work practices.
- Dealing with complex/escalated queries.
- Produce accurate and timely reports to monitor accounts and recommend action on bad debt, escalating outstanding debt for debt collection.
- Maintaining relationships with relevant external organisations (e.g. Police, Bankruptcy Agencies, Debt Collections Agencies) leading to an effective exchange of confidential information.

Key skills

- Ability to limit debtors and implement company credit/collection policy
- Negotiation and interpersonal skills.
- Strong administration and team management skills.
- Ability to train, motivate and provide feedback to staff in a team environment.
- Good facilitation and communication skills.

Internal contacts

Finance, Contact Centre Operations, Sale and Marketing teams

External contacts

External credit agencies, customers

Typical experience

3-5 years relevant experience, usually coupled with a recognised qualification - diploma or certificate.

Other comments

Position Description

Position title:	Senior Credit / Collections Representative
Position code:	14140
Level:	3

Responsible for

Minimising organisational debtors and resultant bad debts within limits of company policy through the application of pre-determined procedures, and supervising and training staff in their role of collecting arrears and performing general Credit Control duties.

Report to

Credit Manager.

Supervises

Can supervise Credit Control Representatives.

Main activities

- Directing and supervising the activities of the Credit Control function, ensuring both the timely collection of outstanding amounts and the maintenance of outstanding debts at acceptable levels.
- Ensuring speedy and effective recovery of amounts outstanding often dealing with debt collection agencies by personal and telephone contact.
- Authorising the granting of credit to selected customers within the guidelines of company policy.
- Ensuring that correct company procedures and guidelines are followed - acting as a checking/supervising officer.
- Continually training and developing operational staff in order to maintain and improve the efficiency of Credit Control.
- Producing accurate and timely reports to monitor accounts and recommending policy and action on bad debt and passing on outstanding debts for debt collection.
- Trying to resolve the more difficult cases by liaising with Financial Counsellors, solicitors and other legal bodies.

Key skills

- Ability to limit debtors and implement company credit policy.
- Staff supervisory skills.
- Strong administration, organisation and procedural knowledge.

Internal contacts

Sales Managers, Sales Representatives, Sales Administrative staff, Legal department, Operational staff, Finance and Administration staff.

External contacts

Major Debtors, Debt Collection Agencies, Credit Reference Bureaus, Credit Referees, Other Financial Institutions, Solicitors, Financial Counsellors.

Typical experience

At least 4-5 years of relevant collections experience and may possess qualifications in Credit Management.

Other comments

Position Description

Position title: Credit / Collections Representative
Position code: 14145
Level: 2

Responsible for

Establishing the credit worthiness of customers and granting credit and/or managing debt recovery within pre-established policy guidelines.

Report to

Credit/Collections Manager, Financial Controller.

Supervises

Typically no supervisory responsibilities

Main activities

- Investigating credit worthiness of potential customers prior to entering into business arrangements and/or existing customers prior to entering into extended business arrangements.
- Granting credit or recommending approval for credit within policy guidelines.
- Preparing reports on credit ratings on customers.
- Participating in studies of economic conditions in selected industries and recommending appropriate changes in credit limits and practices.
- Entering, maintaining and reconciling monthly debtor accounts.
- Ensuring both the timely collection of outstanding amounts and the maintenance of outstanding debts at acceptable levels through contact with customers by one or more channels.
- Recommending actions to be taken with delinquent accounts and bad debts and passing on outstanding debts for debt collection and/or further legal action.
- Processing all administrative material as required, processing computer returns and dealing with personal enquiries.

Key skills

- Ability to limit debtors and implementing company credit policy.
- Strong administrative, procedural and organisational skills.
- Ability to deal with difficult customers and build relationships at all levels.
- Excellent written and oral communication skills.
- Strong negotiation skills.

Internal contacts

Sales Managers, Sales Representatives, Sales Administrative staff, Customer Operations staff, Finance teams

External contacts

Major Debtors, Debt Collection Agencies.

Typical experience

A minimum of 12 months experience coupled with a recognised qualification - diploma or certificate.

Other comments

Position Description

Position title: Financial Accounting Manager
Position code: 14025
Level: 5

Responsible for

Line Manager responsibility for managing and controlling functional areas of the Financial Accounting department.

Report to

Divisional Executive, Chief Financial Officer, Chief Executive/Managing Director.

Supervises

Financial Accounting staff and Administration staff.

Main activities

- Managing activities associated with organisational Financial planning reports.
- Providing high level analyses and commentary to Management.
- Managing the co-ordination and maintenance of Financial accounts and general ledger systems to ensure the maintenance of a common information base.
- Managing budget processes and preparing various high level management reports on a monthly, quarterly and/or annual basis.
- Establishing, developing and implementing effective Financial accounting controls and systems within a branch or region.
- Maintain awareness of business outlooks, and provide primary interface on accounting matters to planning.
- Delivers management level presentations on financial matters which highlight alternatives, recommendations, business implications, and risks.
- Provide leadership, motivation, coaching, resources, and tools for a department of accounting professionals.

Key skills

- Skills in forecasting and control of liquidity.
- Ability to analyse and communicate Financial information.
- Advanced knowledge of accounting theory, practice, and internal control.
- Superior communication and negotiations skills required for regular interactions with senior management.

Internal contacts

Divisional Managers, Internal Audit, MIS Manager, Sales and Marketing staff, Legal Officer.

External contacts

External auditors, government officials, bank officials, customers and suppliers.

Typical experience

At least 8 years relevant experience. Requires professional qualifications, normally CPA/CA.

Other comments

Position Description

Position title: Senior Financial Accountant
Position code: 14030
Level: 4

Responsible for

Organising the planning, budgeting and reporting of Financial transactions and information and/or supervising the coordination of budgeting processes on a monthly, quarterly and annual basis.

Report to

Chief Accountant/Financial Controller.

Supervises

May supervise Accounting Department staff.

Main activities

- Supervising activities associated with organisational Financial planning reports.
- Providing analyses and commentary to accounts and Financial reports and assisting Managers to evaluate and integrate the information they receive.
- Coordinating and maintaining the Financial accounts and general ledger systems to ensure the maintenance of a common information base.
- Coordinating various budget processes and preparing various management reports on a monthly, quarterly and/or annual basis.
- Establishing and maintaining effective Financial accounting controls and systems within a region or nationally.
- Directing payroll activities and the maintenance of associated records.
- Ensuring the security of Financial systems and the integrity of audit trials.
- Preparing and submitting statutory returns as required.

Key skills

- Skills in forecasting and control of liquidity.
- Ability to analyse and communicate Financial information.
- Computer literacy - with a sound knowledge of Accounting software and spreadsheet programmes.

Internal contacts

Divisional Managers, Internal Audit, IT Manager, Sales and Marketing staff, Legal staff.

External contacts

External Auditors, Government Officials, Bank Officials, Customers and Suppliers.

Typical experience

7+ years of relevant experience in the full range of Financial Accounting activities - including general accounting, financial analysis and reports. Will have completed CPA/CA.

Other comments

A senior role organising mainstream accounting activities and providing experienced analysis and commentary to Management.

Position Description

Position title: Financial Accountant
Position code: 14035
Level: 3

Responsible for

Undertaking financial planning and budgeting, and collating all financial information required by various statutory authorities.

Report to

Chief Accountant/Financial Controller.

Supervises

Accounts Department staff.

Main activities

- Accountable for all Financial budgeting and planning activities.
- Preparing regular Financial and statistical reports for various operating divisions.
- Preparing all statistical and Financial returns required by the statutory authorities.
- Ensuring the correct and effective maintenance of the organisation's Financial accounting and general ledger systems.
- Ensuring requirements relating to both internal Financial and external regulatory information are catered for by computerised information systems.
- Regular liaison with both the Internal and External Auditors.
- Maintenance of the fixed-asset register.

Key skills

- Skills in forecasting and control of liquidity.
- Ability to analyse and communicate Financial information.
- A strong team player who can work autonomously when required.

Internal contacts

Divisional Managers, Internal Auditors, IT Manager, Sales and Marketing staff, Legal Officer.

External contacts

External Auditors, Government Officials, especially the Taxation Office.

Typical experience

Will have at least 4 years of experience in the full range of Financial accounting activities, coupled with recognised professional qualifications (or be working towards completion).

Other comments

Alternative Title: Accountant.

Position Description

Position title: Assistant Accountant
Position code: 14060
Level: 2

Responsible for

Supervising the processing, analysis and reporting of financial transactions and information and/or supervising the coordination of budgeting processes and preparing various management reports on a monthly, quarterly and annual basis.

Report to

Chief Accountant/Financial Controller.

Supervises

No supervisory responsibilities.

Main activities

- Performing activities associated with organisational financial planning and/or management accounting reports.
- Providing analyses and commentary to accounts and financial/management reports.
- Maintaining the financial/management accounts and general ledger systems (at least to trial balance stage) to ensure the maintenance of a common information base.
- Assisting with the participation of various budget processes and assisting with the preparation of various management reports, mostly on a monthly, quarterly and annual basis.
- Assisting in monitoring and reporting on cash flow and liquidity.
- Ensuring requirements relating to both internal financial/management and external regulatory information are catered for by computerised information systems.
- Assisting with the preparation and submission of statutory returns as required.
- Assisting in special investigations/projects concerning a wide-range of commercial accounting issues as required.
- Providing or supervising the clerical activities involved in such activities as reconciling the inter-organisational information required for management reporting purposes.

Key skills

- Ability to analyse and communicate financial information.
- Sound knowledge of organisational accounting procedures.
- Developing skills within financial/management accounting principles.
- Computer literacy - with a sound knowledge of accounting software and spreadsheet programmes.

Internal contacts

Divisional Managers, Internal Audit, IT staff, Sales and Marketing staff, Legal staff.

External contacts

External Auditors, Government Officials, Bank Officials, Customers and Suppliers.

Typical experience

At least 2-4 years of relevant accounting experience - including exposure to such activities as general accounting, financial analysis and reports. Will possess (or be working towards to the completion of) recognised professional qualifications.

Other comments

A developmental role within the organisation's accounting area.

Position Description

Position title: Finance Administrator
Position code: 14150
Level: 2

Responsible for

Acting in a administrative support capacity for the finance team/division. Performing varied functions.

Report to

Finance Manager, Payroll Manager, Accounts Manager, Accountant, Branch Manager

Supervises

No reports

Main activities

- Supporting a group of staff within a finance department, following and actioning priority of assigned work.
- May assist with accounts payable, accounts receivable, ledgers, import/export transactions. Other general administrative duties including data entry for example
- Maintaining and updating databases and records..
- Cashiering and banking, carrying out foreign exchange transactions and insurance claims.
- Ensuring satisfactory completion of all necessary documentation before final processing.
- Drafting of correspondence as required.
- Collating reports and statistical information and creating PowerPoint presentations within area of assigned activity.

Key skills

- Excellent interpersonal and communication skills.
- Advanced MS Office skills.
- Ability to prioritise individual work load with that of the Team.
- Developing supervisory skills.
- Ability to work in a team environment.

Internal contacts

staff at all Levels, Internal Auditors.

External contacts

Suppliers of Business Equipment, Customers and Clients, External Auditors.

Typical experience

At least 5 years applicable experience in a specific functional area. High school qualifications or equivalent with course work in business curriculum.

Other comments

Alternative Titles: Senior Accounts Clerk, Administration Supervisor.

Position Description

Position title: Internal Audit Manager
Position code: 14090
Level: 5

Responsible for

Carrying out independent operational audits of the organisation's activities and reporting any discrepancies to enable correction to be applied with minimum damage to its operations, finances and creditability.

Report to

Chief Executive Officer, Financial Divisional Manager.

Supervises

A team of Internal Audit staff.

Main activities

- Ensuring regular and prescribed audits of within the organisation/branches are undertaken in accordance with laid down policies and procedures.
- Presenting regular audit reports to Management verifying the accuracy of all transactions and reporting on other significant findings in the organisation's operations.
- Establishing systems designed to reveal the company's exposure to fraud from both internal and external sources, reporting on the facts, and recommending protective measures.
- Advising on all organisational systems which may give rise to error, criminal activity or waste, leading to improvements which minimise the risk of occurrence.
- Regularly recommending changes for improvement to the organisation's financial methods.
- Continually improving audit techniques, often using computer based methods.

Key skills

- Excellent knowledge of the organisation's operating activities, financial systems, controls and computer based audit techniques.
- Advanced written and oral communication skills.
- Well developed analytical skills.

Internal contacts

Finance and Accounting staff, department Heads.

External contacts

Legal Advisors, External Auditors, Legal Authorities (Police).

Typical experience

Will have at least 8+ years experience and be an experienced Accountant with relevant professional accounting qualifications.

Other comments

Alternative Title: Chief Internal Auditor.

Position Description

Position title: Senior Internal Auditor
Position code: 14095
Level: 4

Responsible for

Performing compliance and value audits of operations and assisting in planning, scheduling and monitoring portions of the Audit Program.

Report to

Internal Audit Manager.

Supervises

May supervise casual resources and lead a team of Auditors on specific audit tasks.

Main activities

- Conducting audits in accordance with accepted review standards.
- Evaluating compliance with Acts, policies and procedures.
- Reviewing reliability and integrity of financial, operating and management information.
- Reviewing the means of safeguarding assets.
- Evaluating the economy, efficiency and effectiveness of operations.
- Forming opinions and assisting management on the adequacy of management, financial and operational controls.
- Assisting the manager plan, schedule and monitor performance against the Audit Program.
- Participating in computer based auditing of operations.
- Participating in an advisory capacity on projects and systems.
- Leading a team of Auditors.

Key skills

- Strong written and oral communication skills.
- Well developed analytical skills.
- Knowledge of the organisation's operating activities, financial systems, controls and audit techniques.

Internal contacts

Internal Audit staff, Operational staff.

External contacts

External Auditors, Supervisory bodies and Legal Advisors.

Typical experience

At least 3-5 years of experience in Auditing or a related field, coupled with appropriate tertiary qualifications and membership with a professional body.

Other comments

Position Description

Position title: Internal Auditor
Position code: 14100
Level: 3

Responsible for

Evaluating compliance with legislative provisions, policies and procedures. Assessing the adequacy of systems of internal control and reviewing the efficiency and effectiveness of computing operations.

Report to

Internal Audit Manager.

Supervises

Typically no supervisory responsibilities.

Main activities

- Planning and executing audits in accordance with accepted review standards.
- Evaluating compliance with Acts, policies and procedures.
- Reviewing reliability and integrity of financial, operating and management information.
- Ensuring that risk management, control and governance processes are appropriately maintained.
- Evaluating the efficiency and effectiveness of operations.
- Assisting the Manager to plan, schedule and monitor performance against the Audit Program.
- Participating in computer based auditing of operations.

Key skills

- Knowledge of the organisation's operating activities, financial systems, controls and computer based audit techniques.
- Strong written and oral communication skills.
- Well developed analytical skills.

Internal contacts

Internal Audit staff, Operational staff.

External contacts

External Auditors, Legal Advisers.

Typical experience

Will have 3-5 years experience coupled with appropriate tertiary qualifications.

Other comments

Position Description

Position title: Management Accounting Manager
Position code: 14040
Level: 5

Responsible for

Line Manager responsibility for managing and controlling functional areas of the Management Accounting department.

Report to

Divisional Executive, Chief Financial Officer, Chief Executive/Managing Director.

Supervises

Management Accounting staff and Administration staff.

Main activities

- Provide Business units and senior management with financial tracking & advice against profit & loss performance.
- Enhance processes to achieve more accurate and timely information for Business Units to free up resources for more value added work.
- Modelling and evaluation of the financial assumptions and implications of business unit projects/initiatives.
- Develop management reporting systems and accounting methods in order to improve existing financial management reporting system and budget variance reporting.
- Preparation of business unit Budgets and provision of information for inclusion in business unit Strategic Plans.
- Collating information from the operating divisions and consolidating into various high level management reports mostly on a monthly, quarterly and annual basis.
- Provide leadership, motivation, coaching, resources, and tools for a department of accounting professionals

Key skills

- Skills in forecasting and control of liquidity.
- Ability to analyse and communicate Financial information.
- Advanced knowledge of accounting theory, practice, and internal control.
- Superior communication and negotiations skills required for regular interactions with senior management.

Internal contacts

Accounts Department, Functional Managers.

External contacts

External Auditors, Government Officials, Bank Officials, Customers and Suppliers.

Typical experience

At least 8 years of relevant experience in the full range of Management Accounting activities - including general accounting, financial analysis and management reporting. Will have completed CPA/CA.

Other comments

Position Description

Position title: Senior Management Accountant
Position code: 14045
Level: 4

Responsible for

Supervising the coordination of budgeting process and preparing various management reports on a monthly, quarterly and annual basis.

Report to

Divisional Manager - Finance, Chief Accountant/Financial Controller.

Supervises

Assistant Accountant and clerical staff.

Main activities

- Liaising with Operational Managers to assist them in preparing their management information reporting systems.
- Collating information from the operating divisions and consolidating into various management reports mostly on a monthly, quarterly and annual basis.
- Assisting Managers to evaluate and integrate the information they receive.
- Liaising with the Financial Accountants to ensure the maintenance of a common information base.
- Preparing longer term management forecasts and plans, relying on the interpretation of projected trends and economic predictions.

Key skills

- Skills in forecasting and control of liquidity.
- Ability to analyse and communicate financial information.

Internal contacts

Accounts department, Functional Managers.

External contacts

Other financial institutions, Economic Advisers and Computer Software Suppliers.

Typical experience

At least 7 years of relevant experience in the full range of Management Accounting activities - including general accounting, financial analysis and management reporting. Will have completed CPA/CA.

Other comments

Position Description

Position title: Management Accountant
Position code: 14050
Level: 3

Responsible for

Undertaking various management accounting activities.

Report to

Divisional Manager - Finance, Chief Accountant/Financial Controller.

Supervises

Assistant Accountant and clerical staff.

Main activities

- Liaising with Operating Managers to assist them in preparing their Management information reporting systems.
- Collating information from the operating divisions and consolidating into various Management reports, mostly on a monthly, quarterly and annual basis.
- Assisting Managers to evaluate and integrate the information they receive.
- Liaising with the Financial Accountants to ensure the maintenance of a common information base.
- Preparing longer term Management forecasts and plans, often relying on the interpretation of projected trends and economic predictions.

Key skills

- Skills in forecasting and control of liquidity.
- Ability to analyse and communicate financial information.
- A strong team player who can work autonomously when required.

Internal contacts

Divisional Managers, Internal Auditors, Data Processing Manager, Sales and Marketing staff, Legal Officer.

External contacts

Other financial institutions, Economic Advisers, External Auditors, Fund Managers and Computer Software Suppliers.

Typical experience

Will have at least 4 years of experience in the full range of Management accounting activities and may have completed or be undertaking their C.A. or C.P.A.

Other comments

Position Description

Position title: Payroll Manager
Position code: 14115
Level: 4

Responsible for

Managing the payroll function and staff associated with the processing of all manual and automated payments.

Report to

Finance Manager or Senior Human Resources Manager.

Supervises

May supervise a payroll team of 2 to 10 staff.

Main activities

- Monitoring correctness, eligibility and timeliness of payments in terms of Awards, EBAs, Employment Contracts, organisational policies and other relevant legislation.
- Overseeing and monitoring annual projects such as issue of performance payments.
- Assisting in the design and implementation of enhancements to the organisation's payroll system and procedures.
- Managing and supervising payroll staff including training and development and performance reviews.
- Liaising with internal and external auditors.
- Ensuring accurate preparation of workers' compensation returns, payroll tax returns and group tax reconciliations.
- Overseeing the efficient preparation of management reports based upon information within the payroll system.
- Resolving/answering queries relating to payroll across the company.

Key skills

- Knowledge of legislative requirements in respect of PAYE, FBT, payroll tax and EEO principles.
- Sound understanding of Industrial Award/Enterprise Agreements, organisation's payroll system and salary grades.
- Strong leadership ability, excellent communication and well developed interpersonal skills.
- Tact, diplomacy and assertiveness in applying policy.
- Sound knowledge of the organisation's human resource information system and computerised payroll system.
- Numeric accuracy.

Internal contacts

Payroll staff, Human Resources, IT department.

External contacts

Outsourced Payroll Services, Industry and Employer Organisations, relevant government departments such as the department of Industrial Relations and Trade Union officials.

Typical experience

Strong background in payroll, with at least 4-6 years relevant experience. May have tertiary qualifications in Finance or Accounting.

Other comments

Position Description

Position title: Payroll Team Leader
Position code: 14119
Level: 3

Responsible for

Supervising and participating in the processing of all manual and automated payments to staff while ensuring compliance with all related legislation.

Report to

Payroll Manager, Human Resource Administration Manager or Senior Finance.

Supervises

Supervises a small team of Payroll Officers.

Main activities

- Ensuring salaries and wages are distributed accurately and on time as per EBA, Award, Employment Contracts and other legislative requirements.
- Interpreting awards/agreements/contracts.
- Preparing, balancing and reconciling the following: payroll tax, PAYE tax and FBT, superannuation, annual group certificates.
- Maintaining leave, sickness and accident records.
- Maintaining overtime reports.
- Preparing management reports based upon information within the payroll system.
- Undertaking required statutory reporting.
- Assisting Payroll Officer/s and conducting training of junior payroll staff as required.
- Resolving/answering queries relating to payroll across the organisation.

Key skills

- Understanding of computerised payroll systems and Human Resource Information Systems (HRIS).
- Developing knowledge of related legislation relating to Industrial Awards/Enterprise Agreements, PAYG, FBT, payroll tax and EEO principles.
- Good understanding of the organisation's policies as they relate to payroll.
- Excellent communication and interpersonal skills.
- Ability to explain policies and procedures.
- Tact, diplomacy and assertiveness in applying policy.

Internal contacts

Payroll staff, IT department, Human Resources.

External contacts

Payroll Services/Data Processing Bureau, Industry and Employer organisations, relevant government departments such as the department of Industrial Relations, various Trade Union officials.

Typical experience

Around 3-5 years of practical experience in Payroll. May have tertiary qualifications in Finance or Accounting.

Other comments

Alternative Title: Payroll Supervisor.

Position Description

Position title: Senior Payroll Officer
Position code: 14120
Level: 2

Responsible for

Supervising and participating in the processing of all manual and automated payments to staff while ensuring compliance with all related legislation.

Report to

Payroll Manager, Payroll Team Leader, Human Resource Administration Manager or Senior Finance.

Supervises

May supervise a small team of Payroll Officers.

Main activities

- Ensuring salaries and wages are distributed accurately and on time as per EBA, Award, Employment Contracts and other legislative requirements.
- Interpreting awards/agreements/contracts.
- Preparing, balancing and reconciling the following: payroll tax, PAYG tax and FBT, superannuation, annual group certificates.
- Maintaining leave, sickness and accident records.
- Maintaining overtime reports.
- Preparing management reports based upon information within the payroll system.
- Undertaking required statutory reporting.
- Assisting Payroll Officer/s and conducting training of junior payroll staff as required.
- Resolving/answering queries relating to payroll across the organisation.

Key skills

- Understanding of computerised payroll systems and Human Resource Information Systems (HRIS).
- Developing knowledge of related legislation relating to Industrial Awards/Enterprise Agreements, PAYG, FBT, payroll tax and EEO principles.
- Good understanding of the organisation's policies as they relate to payroll.
- Excellent communication and interpersonal skills.
- Ability to explain policies and procedures.
- Tact, diplomacy and assertiveness in applying policy.

Internal contacts

Payroll staff, IT department, Human Resources.

External contacts

Payroll Services/Data Processing Bureau, Industry and Employer organisations, relevant government departments such as the department of Industrial Relations, various Trade Union officials.

Typical experience

Around 3-5 years of practical experience in Payroll. May have tertiary qualifications in Finance or Accounting.

Other comments

Position Description

Position title: Payroll Officer
Position code: 14125
Level: 2

Responsible for

Administering and processing all manual and automated payments to staff.

Report to

Senior Payroll Officer, Payroll Manager, Human Resources Manager, Chief Accountant or General Manager in a smaller organisation or division.

Supervises

No supervisory responsibilities.

Main activities

- Preparing weekly and monthly payrolls and distributing to all staff.
- Ensuring all time sheets, payroll changes, records and other related material is received prior to close of payroll run.
- Assisting with the preparation, balancing and reconciliation of the following: payroll tax, group tax, PAYG tax and FBT, superannuation, annual group certificates, group and workers compensation premiums and authorised payroll deductions.
- Maintaining pay records, employee records, leave records and related information.
- Providing details of organisational superannuation contributions as processed through the payroll.
- Undertaking all coding related to salaries and leave.
- Calculating, paying and coding all casual employees' pays.
- Calculating termination pays.
- Assisting in the preparation of management reports based upon information within the payroll system.
- Maintaining both computerised and paper based filing systems.

Key skills

- Knowledge of basic payroll procedures, organisational structure, Awards and organisational policies.
- Good communication and interpersonal skills.
- PC application skills e.g.. Spreadsheets.
- Good time management skills.

Internal contacts

Payroll staff, All staff, Management.

External contacts

External Payroll Bureau, Software suppliers.

Typical experience

Will have 1-2 years experience in payroll coupled with senior high school level of education.

Other comments

Alternative Title: Payroll Clerk.

Position Description

Position title: Corporate Tax Manager
Position code: 14070
Level: 5

Responsible for

Providing leadership and advice on corporate tax policy and participating in planning the organisation's activities to optimise tax costs and ensure tax compliance consistently and in line with corporate objectives.

Report to

Financial Controller/Divisional Financial Controller.

Supervises

May supervise a small team of Tax Accounting staff.

Main activities

- Ensuring that all required taxation returns are prepared in compliance with various tax regulations and ensuring adequate provisions are made for the payment of taxes.
- Representing the organisation in the event of audits, investigations or queries from revenue authorities.
- Coordinating the lodgement of tax returns, reviewing assessments for objections on appeals, personally presenting and arranging objections or appeals and authorising payments of taxes.
- Formulating, implementing and maintaining tax procedures and policies which includes the training of employees in correct methods of allocating costs such as travelling and entertainment.
- Determining requirements for research designed to establish compliance with applicable tax laws at minimal cost and directing corporate programmes to ensure such compliance.
- Providing advice to Management of the tax implications of proposed major transactions including mergers, acquisitions and disposal of assets and recommending necessary changes if required.
- Advising the organisation of developments and the impact of new or proposed legislation, decisions, regulations and rulings in tax and related areas.
- Advising Management of appropriate means to effectively reduce the incidence of tax by investigating opportunities and promoting tax awareness throughout the organisation.
- Employing and directing the services of professional tax consultants as required.

Key skills

- Thorough knowledge of relevant Tax Assessment Act and associated legislation.
- Initiative planning and decision making.
- Business Awareness.
- Communication, analytical and computer skills.
- Ability to build strong working relationships.

Internal contacts

Finance and Administration staff, Marketing and Sales Managers, Line Managers, Internal Audit.

External contacts

Taxation and Legal Advisers, External Auditors, Customers and Suppliers.

Typical experience

At least 10 years general accounting experience with more than 5 years in taxation management, coupled with relevant tertiary qualifications - usually in Accounting, Commerce or Law.

Other comments

Position Description

Position title: Senior Tax Accountant
Position code: 14075
Level: 4

Responsible for

Providing advice on Taxation issues relating to specific business units and ensuring compliance with relevant tax laws and regulations.

Report to

Corporate Taxation Manager, Financial Controller, Chief Accountant.

Supervises

No supervisory responsibilities.

Main activities

- Providing Taxation advice to the Financial Controller and Business Unit Managers concerning the impact of new or proposed legislation, decisions, regulations and rulings in tax and related areas.
- Providing research assistance and drafting advice notes and related correspondence for the Corporate Taxation Manager on day-to-day issues.
- Participating in planning activities to optimise tax costs - consistent with overall corporate objectives.
- Liaising with the Inland Revenue Department in relation to tax issues, audits and reviewing assessments.
- Ensuring that all required Taxation returns are prepared in compliance with various tax regulations and ready for approval by the Corporate Taxation Manager.
- Assisting with formulating, implementing and maintaining tax procedures and policies which includes the training of employees in correct methods of allocating costs such as travelling and entertainment.
- Maintaining an up-to-date knowledge of the relevant tax laws and regulations and ensuring compliance by the organisation.
- Reviewing tax accounting information regularly - at least biannually.

Key skills

- Thorough knowledge of relevant Tax Assessment Act and associated legislation.
- Initiative planning and decision making.
- Business Awareness.
- Communication, analytical and computer skills.

Internal contacts

Internal Audit, Line Managers, Finance and Administration staff.

External contacts

Inland Revenue Department, Taxation and Legal Advisors.

Typical experience

7+ years of general accounting experience coupled with both a good knowledge of taxation law and relevant tertiary qualifications - usually in Accounting, Commerce or Law.

Other comments

Alternative Title: Taxation Officer.

Position Description

Position title: Tax Accountant
Position code: 14080
Level: 3

Responsible for

Providing advice on taxation issues relating to specific business units and ensuring compliance with relevant tax laws and regulations.

Report to

Corporate Taxation Manager, Financial Controller, Chief Accountant.

Supervises

Typically no supervisory responsibilities.

Main activities

- Providing taxation advice to the Financial Controller and Business Unit Managers concerning the impact of new or proposed legislation, decisions, regulations and rulings in tax and related areas.
- Providing research assistance and drafting advice notes and related correspondence for the Corporate Taxation Manager on day-to-day issues.
- Participating in planning activities to optimise tax costs - consistent with overall corporate objectives.
- Liaising with the Inland Revenue Department in relation to tax issues, audits and reviewing assessments.
- Ensuring that all required taxation returns are prepared in compliance with various tax regulations and ready for approval by the Corporate Taxation Manager.
- Assisting with formulating, implementing and maintaining tax procedures and policies which includes the training of employees in correct methods of allocating costs such as travelling and entertainment.
- Maintaining an up-to-date knowledge of the relevant tax laws and regulations and ensuring compliance by the organisation.
- Reviewing tax accounting information regularly - at least biannually.

Key skills

- Thorough knowledge of relevant Tax Assessment Act and associated legislation.
- Initiative planning and decision making.
- Business Awareness.
- Communication, analytical and computer skills.

Internal contacts

Internal Audit, Line Managers, Finance and Administration staff.

External contacts

Inland Revenue Department, Taxation and Legal Advisors.

Typical experience

Will have at least 4 years of general accounting experience coupled with both a good knowledge of taxation law and relevant tertiary qualifications - usually in Accounting, Commerce or Law.

Other comments

Alternative Title: Taxation Officer.

Position Description

Position title: Group Treasury Manager
Position code: 14200
Level: 6

Responsible for

Managing all treasury functions and legal documentation of the Group

Report to

Chief Financial Officer

Supervises

Treasury Manager

Main activities

- Managing the overall treasury function of the Group / Company, legal documentation and the development of the treasury team to ensure the team's continuous ability to deliver business performance.
- Ensuring effective sourcing of debt domestically and offshore to meet the working requirement of the company.
- Determining treasury strategies in relation to debt capital management and financial risk management, and recommending all treasury decisions to senior management and the board.
- Managing all unsecured and secured loan and debt capital market facilities, interest rate risk and foreign exchange rate profile, and developing risk management strategies.
- Ensuring treasury staff manage treasury operations.
- Managing execution of interest rate and foreign exchange transactions
- Developing, training, coaching and mentoring the team to ensure they are able to deliver results in line with meeting company's objectives and business performance.
- Working with the CFO to deliver projects assigned from time to time in accordance with agreed budgets, schedules and specifications.
- Ensuring adherence and compliance to the company's policies and procedures in relation to treasury functions.

Key skills

- Sound understanding of developments and trends in the property and/or funds management industry
- Strong writing and business case development skills
- Strong business acumen and project management skills
- Leadership skills and proven track record in managing and motivating staff
- Experience in management of change and organisational transformation, in corporate environments
- Demonstrated ability to communicate effectively at all levels both verbal and written

Internal contacts

Finance, Senior Management and the Board

External contacts

Group Bankers, Credit Rating Agencies

Typical experience

CA / CPA qualified with tertiary degree qualification in Accounting / Finance complimented with a post-graduate qualification e.g.. Masters of Applied Finance & Investments. Minimum of 12-15 years working experience with strong exposure to financial markets, property or funds management.

Other comments

Alternative title: Head of Treasury

Position Description

Position title: Treasury Manager
Position code: 14205
Level: 5

Responsible for

Managing the company's funding platform

Report to

CFO

Supervises

Treasury staff

Main activities

- Refinancing facilities including research, negotiation with banks/investors and legal documentation
- Maintaining and ensuring compliance with terms of facilities and in line with Company treasury policy and changes to facility terms
- Working with CFO on new funding initiatives and strategies, including scoping the requirements for acquisitions in addition to ad-hoc funding analysis and projects
- Analysing business model outputs and proposals and reporting for Board, Capital Markets Committee, and rating agencies. Maintaining relationships with banks, rating agencies and capital markets investors by facilitating dialogue, providing updates and presentations.
- Assisting in the development and management of treasury policy
- Maintaining and improving the treasury system

Key skills

- Strong written communication skills with a focus on detail and strong verbal communication and negotiation skills
- Demonstrated knowledge of and experience in debt funding products (bank debt, domestic & international capital markets, hybrids, convertible bonds)
- Good understanding of financial markets, accounting, tax and legal issues relating to a corporate treasury
- Ability to price interest rate and foreign exchange derivatives, and experience using a treasury system highly advantageous

Internal contacts

Senior Management, other Finance

External contacts

Debt investors

Typical experience

Tertiary degree qualification in Accounting / Economics / Business and studying towards a post-graduate qualification e.g.. Masters. Minimum of 5 years experience in a similar role in property industry or general financial services.

Other comments

Position Description

Position title: Graduate - Technical Degree
Position code: 20015
Level: 1

Responsible for

Undertaking activities of a limited scope under close supervision within a Technical Job Family (e.g. IT, Research and Development, Engineering, Customer Support, Technical Support).

Report to

Team Leader/Manager.

Supervises

No supervisory responsibilities.

Main activities

- Conducting minor assignments under close supervision.
- Preparing and presenting basic technical reports, analyses and documents.
- Utilising a variety of standard methodologies and techniques in solving basic technical problems.
- Assisting more senior staff in analysing information.
- Developing an understanding of the business.
- Undergoing training, either formal or informal, on a regular basis.
- Contributing to team projects.

Key skills

- Research skills acquired at university.
- Developing communication, organisational, analytical and problem solving skills.
- Developing technical ability.

Internal contacts

staff at all levels.

External contacts

No external contacts.

Typical experience

3 or 4 year Technical (including IT, Computer Science, Engineering, Maths, Biology, Chemistry, etc.) degree.

Other comments

Position Description

Position title: Graduate - Non-Technical Degree
Position code: 20005
Level: 1

Responsible for

Undertaking activities of a limited scope under close supervision within a Non-Technical Job Family (e.g. Sales, Marketing, Finance and Administration, Human Resources, Customer Service).

Report to

Team Leader/Manager.

Supervises

No supervisory responsibilities.

Main activities

- Conducting minor assignments under close supervision.
- Preparing and presenting basic reports, analyses and documents.
- Utilising a variety of standard methodologies and techniques in solving basic problems.
- Assisting more senior staff in analysing information.
- Developing an understanding of the business.
- Undergoing training, either formal or informal, on a regular basis.
- Contributing to team projects.

Key skills

- Research skills acquired at university.
- Developing communication, organisational, analytical and problem solving skills.

Internal contacts

staff at all levels.

External contacts

No external contacts.

Typical experience

3 or 4 year Non-Technical (including Marketing, Communications, Business, Commerce, Economics, Human Resources, Arts, Psychology, etc.) degree.

Other comments

Position Description

Position title: HR Manager - Generalist
Position code: 17030
Level: 5

Responsible for

Providing business partnering to an organisation and/or business unit, and owning human resources functional responsibility.

Report to

Depending on organisational size and structure, Head of Human Resources or Functional Lead of Human Resources within large organisations, or Chief Executive Officer/General Manager within smaller organisations.

Supervises

Depending on organisational size and structure, may supervise a combination of Senior Human Resources Consultants, Human Resources Consultants, Human Resources Associates and/or Human Resources Administration staff, or may be an individual contributor role.

Main activities

- Working with Executive/Strategic Management to build and implement human resources solutions in line with business strategy.
- Managing the delivery of recommendations and solutions covering multiple areas of human resources, including employment/education training, employee development, communications, compensation, benefits, record administration, and affirmative action.
- Identifying areas of long-term strategic development within the human resources environment.
- Providing interpretation and counsel to Executive/Strategic Management regarding policies, programs and practices.
- Researching issues and developing solutions to resolve strategic business issues.
- Developing and implementing new policies, practices and programs to meet organisational and Executive/Strategic Management needs.

Key skills

- Management, leadership, team building, consulting, negotiation and facilitation skills.
- Expert knowledge of human resource organisational policies and practices.
- Expert knowledge of generalist human resources best practice.
- Strategic business knowledge and understanding.
- Strong relationship management and influencing skills.
- Excellent communication skills and highly service orientated.
- Knowledge of current employment legislation and 'Employer of Choice' practices.
- Business partnering capability.
- Ability to interact at an executive/strategic level.

Internal contacts

Close contact at all levels of the organisation.

External contacts

Human Resources Consultancies, Vendors, Unions, Industry Associations.

Typical experience

8+ years of experience in human resources, coupled with a relevant tertiary qualification.

Other comments

This role may be the organisation's most senior Human Resources practitioner in a small to medium sized operation.

Position Description

Position title: Senior HR Consultant - Generalist
Position code: 17055
Level: 4

Responsible for

Providing business partnering to an organisation, and/or business unit on a broad range of Human Resources policies, programs and practices.

Report to

Depending on organisational structure, Head of Human Resources, Functional Lead of Human Resources or Human Resources Manager.

Supervises

May supervise Human Resources Associates or Human Resources Administration staff.

Main activities

- Working with Line Management groups to build and implement Human Resources solutions in line with business needs.
- Providing recommendations and solutions covering multiple areas of Human Resources, including employment/education training, employee development, communications, compensation, benefits, record administration, affirmative action, employee or labour relations.
- Providing interpretation and counsel to Line Management regarding policies, programs and practices.
- Researching issues and developing solutions to resolve business issues.
- Developing and implementing new policies, practices and programs to meet organisational and Line Management needs.

Key skills

- Strong consulting, negotiation and facilitation skills.
- In-depth knowledge of Human Resource organisational policies and practices.
- Strong knowledge of Generalist Human Resources best practice.
- Business knowledge and understanding.
- Relationship management and influencing skills.
- Excellent communication skills and highly service orientated.
- Business partnering capability.

Internal contacts

Close contact at all levels of the organisation.

External contacts

Human Resources Consultancies, Vendors, Unions, Industry Associations.

Typical experience

5+ years of experience in Human Resources, coupled with a relevant tertiary qualification.

Other comments

Depending on organisational structure, this role may be a stand-alone Human Resources position that combines strategic and operational tasks and is responsible for aligning activities with the business plan. Alternatively, this role may be part of a Human Resources team structure containing senior Human Resource strategic lead roles (e.g. Head of Human Resources, Functional Lead of Human Resources or Human Resources Manager).

Position Description

Position title: HR Consultant - Generalist
Position code: 17080
Level: 3

Responsible for

Providing assistance and guidance to Line Management, using technical and professional skills/knowledge, on a broad range of Human Resources policies, programs and practices.

Report to

Depending on organisational structure, Head of Human Resources, Functional Lead of Human Resources or Human Resources Manager. This role may be an individual contributor position (i.e.. 'stand-alone' role).

Supervises

No supervisory responsibilities.

Main activities

- Providing services covering multiple areas of Human Resources, including employment/education training, employee development, communications, compensation, benefits, record administration, affirmative action, employee or labour relations, organisational or resource planning, organisational change management or other services.
- Providing interpretation and counsel to Line Management regarding policies, programs and practices.
- Researching issues and developing recommendations to resolve Line Management issues.
- Developing and implementing new policies, practices and programs to meet organisational and Line Management needs.

Key skills

- Consulting and negotiation skills.
- Knowledge of Human Resource organisational policies and practices.
- Relationship management and influencing skills.
- Excellent communication skills and highly service orientated.
- Knowledge of current employment legislation and 'Employer of Choice' practices.

Internal contacts

Close contact at all levels of the organisation.

External contacts

Human Resources Consultancies, Vendors, Unions, Industry Associations.

Typical experience

3+ years of experience in Human Resources, coupled with a relevant tertiary qualification.

Other comments

Depending on organisational structure, this role may be a 'stand-alone' Human Resources position that is primarily operational and responsible for aligning activities with the business plan. Alternatively, this role may be part of a Human Resources team structure containing senior Human Resource strategic lead roles (e.g. Head of Human Resources, Functional Lead of Human Resources or Human Resources Manager).

Position Description

Position title: HR Officer
Position code: 17102
Level: 2

Responsible for

Assisting with the development and review of Human Resources policies, processes, procedures and initiatives within a region/division/Human Resources function or across the business, ensuring the most effective utilisation of Human Resources for the purposes of achieving strategic business objectives.

Report to

Human Resources Manager or Human Resources Director in a smaller organisation.

Supervises

No supervisory responsibilities.

Main activities

- Analysing, prioritising and responding proactively to organisational needs through participating in the development and/or review of Human Resources policies and procedures.
- Performing a range of Human Resources activities and conducting research and analysis within given guidelines and time frames.
- Liaising with both Human Resources Managers and Line Managers to undertake or assist with specific initiatives, projects and assignments.
- Assisting with the delivery of operational support/guidance to Line Managers and individual employees in areas such as organisational change management, employee relations/counselling, job design, performance management, remuneration and benefits, job evaluation, award negotiation, compliance, employee development and succession planning.
- Maintaining and updating the Human Resources Information System (HRIS).
- Actively participating as a member of the Human Resources team for the purposes of delivering optimum Human Resources services.

Key skills

- Problem solving and analysis skills.
- Growing knowledge of a diverse range of Human Resources functions including Recruitment, Learning & Development, Remuneration, Occupational Health & Safety, Industrial Relations and Human Resources Administration.
- Knowledge of current employment legislation and 'Employer of Choice' practices.
- Excellent communications skills.

Internal contacts

Close contact at all levels of the organisation.

External contacts

Human Resources Consultancies, Unions, Industry Associations.

Typical experience

2 - 5 years of experience in Human Resources, coupled with a relevant tertiary qualification.

Other comments

Position Description

Position title: HR Administrator
Position code: 17105
Level: 2

Responsible for

Responsible for providing administrative support to the organisation's Human Resources function.

Report to

Human Resources Administration Manager, Human Resources Manager.

Supervises

No supervisory responsibilities.

Main activities

- Coordinating all aspects of daily salary and wages administration across the organisation including superannuation, absenteeism, overtime, motor vehicle leasing, Workers' Compensation and salary packaging activities.
- Entering personal details of new employees and updating and maintaining all existing records on the organisation's Human Resources Information System (HRIS).
- Generating both regular and ad-hoc reports for Management from the Human Resources Information System (HRIS).
- Preparing employment contracts and induction material for new recruits.

Key skills

- Knowledge of Human Resources Information Systems.
- Strong organisational and administrative skills.
- Excellent communication skills.

Internal contacts

Payroll and Human Resources Administration staff, Human Resources Managers.

External contacts

Payroll Services Specialists, Fleet Leasing companies, Insurance companies, Statutory organisations, Taxation Office.

Typical experience

1+ year of specialised experience in Human Resources Administration or Payroll, coupled with proven qualifications or commercial experience in an administration position.

Other comments

Position Description

Position title: Senior HR Consultant - Recruitment
Position code: 17070
Level: 4

Responsible for

Providing business partnering to an organisation, and/or business unit on a range of Recruitment policies, programs and practices.

Report to

Depending on organisational structure, Head of Human Resources, Functional Lead of Recruitment or Human Resources Manager.

Supervises

May supervise Human Resources Associates or Human Resources Administration staff.

Main activities

- Working with Line Management groups to build and implement Recruitment solutions in line with business needs.
- Providing recommendations and solutions covering specific areas of recruitment, including organisational Resourcing needs analysis, Recruitment market trends analysis, candidate selection, vendor management, analysis of Recruitment metrics, and/or other R
- Providing interpretation and counsel to Line Management regarding Recruitment policies, programs and practices.
- Researching issues and developing Recruitment solutions to resolve business issues.
- Developing and implementing new Recruitment policies, practices and programs to meet organisational and Line Management needs.

Key skills

- Strong consulting, negotiation and facilitation skills.
- In-depth knowledge of Human Resource organisational policies and practices.
- Strong interviewing and role analysis skills.
- Understanding of Recruitment best practices.
- Business knowledge and understanding.
- Relationship management and influencing skills.
- Excellent communication skills and highly service orientated.
- Knowledge of current employment legislation and 'Employer of Choice' practices.
- Business partnering capability.

Internal contacts

Close contact at all levels of the organisation.

External contacts

Recruitment Consultancies

Typical experience

5+ years of experience in Human Resources, coupled with a relevant tertiary qualification.

Other comments

Depending on organisational structure, this role may be a stand-alone Recruitment position that combines strategic and operational tasks and is responsible for aligning activities with the business plan. Alternatively, this role may be part of a Human Resources team structure containing senior Human Resource strategic lead roles (e.g. Head of Human Resources, Functional Lead of Human Resources or Human Resources Manager).

Position Description

Position title: HR Consultant - Recruitment
Position code: 17095
Level: 3

Responsible for

Providing assistance and guidance to Line Management, using technical and professional skills/knowledge, on a range of Recruitment policies, programs and practices.

Report to

Depending on organisational structure, Head of Human Resources, Functional Lead of Human Resources or Human Resources Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing services covering specific areas of Recruitment, including organisational Resourcing needs analysis, Recruitment market trends analysis, candidate selection, vendor management, analysis of Recruitment metrics, and/or other Recruitment services.
- Providing interpretation and counsel to Line Management regarding Recruitment policies, programs and practices (e.g.: EEO, affirmative action).
- Researching Recruitment issues and developing recommendations to resolve Line Management issues.
- Identifying, developing and implementing new Recruitment policies, practices and programs to meet organisational and Line Management needs.

Key skills

- Consulting and negotiation skills.
- Knowledge of Human Resources organisational policies and practices.
- Interviewing skills and an understanding of Recruitment 'best practice'.
- Relationship management and influencing skills
- Excellent communication skills and highly service orientated.
- Knowledge of current employment legislation and 'Employer of Choice' practices.

Internal contacts

Close contact at all levels of the organisation.

External contacts

Recruitment Consultancies.

Typical experience

3+ years of experience in Human Resources, coupled with a relevant tertiary qualification.

Other comments

Position Description

Position title: Senior HR Consultant - Learning & Development
Position code: 17065
Level: 4

Responsible for

Providing business partnering to an organisation, and/or business unit on a range of Learning & Development policies, programs and practices.

Report to

Depending on organisational structure, Head of Human Resources, Functional Lead of Learning & Development or Human Resources Manager.

Supervises

May supervise Human Resources Associates or Human Resources Administration staff.

Main activities

- Working with Line Management groups to build and implement Learning & Development solutions in line with business needs.
- Providing recommendations and solutions covering specific areas of Learning & Development, including training needs analysis, training delivery, training vendor relationship management, course participation management, training logistics, and/or other services.
- Providing interpretation and counsel to Line Management regarding Learning & Development policies, programs and practices.
- Researching issues and developing Learning & Development solutions to resolve business issues.
- Developing and implementing new Learning & Development policies, practices and programs to meet organisational and Line Management needs.

Key skills

- Strong consulting, negotiation and facilitation skills.
- In-depth knowledge of Human Resource organisational policies and practices.
- Strong knowledge of adult learning principles and the ability to develop and deliver Learning & Development programs.
- Business knowledge and understanding.
- Relationship management and influencing skills.
- Excellent communication skills and highly service orientated.
- Knowledge of current employment legislation and 'Employer of Choice' practices.
- Business partnering capability.

Internal contacts

Close contact at all levels of the organisation.

External contacts

Human Resources/ Training Consultancies, Vendors, Educational and Training Institutes

Typical experience

5+ years of experience in human resources, coupled with a relevant tertiary qualification.

Other comments

Depending on organisational structure, this role may be a stand-alone Learning & Development position that combines strategic and operational tasks and is responsible for aligning activities with the business plan. Alternatively, this role may be part of a human resources team structure containing senior human resource strategic lead roles (e.g.: Head of Human Resources, Functional Lead of Human Resources or Human Resources Manager).

Position Description

Position title: HR Consultant - Learning & Development
Position code: 17090
Level: 3

Responsible for

Providing assistance and guidance to Line Management, using technical and professional skills/knowledge, on a range of Learning & Development policies, programs and practices.

Report to

Depending on organisational structure, Head of Human Resources, Functional Lead of Human Resources or Human Resources Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing services covering specific areas of Learning & Development, including training needs analysis, training delivery, training vendor relationship management, course participation management, training logistics, and other services.
- Providing interpretation and counsel to Line Management regarding Learning & Development policies, programs and practices.
- Researching Learning & Development issues and developing recommendations to resolve Line Management issues.
- Identifying, developing and implementing new Learning & Development policies, practices and programs to meet organisational and Line Management needs.

Key skills

- Consulting and negotiation skills.
- Knowledge of adult learning principles and the ability to deliver training programs.
- In-depth knowledge of Learning & Development best practice.
- Knowledge of human resource organisational policies and practices.
- Relationship management and influencing skills.
- Excellent communication skills and highly service orientated.
- Knowledge of current employment legislation and 'Employer of Choice' practices.

Internal contacts

Close contact at all levels of the organisation.

External contacts

Human Resources/Training Consultancies, Vendors, Educational & Training Institutes.

Typical experience

3+ years of experience in human resources, coupled with a relevant tertiary qualification.

Other comments

Position Description

Position title: HR Officer - Learning & Development
Position code: 17103
Level: 2

Responsible for

Facilitating, developing, conducting and reviewing internal company training programs that provide the acquisition of skills necessary to perform essential operating functions.

Report to

Learning & Development Manager.

Supervises

No supervisory responsibilities.

Main activities

- Developing internal training courses in line with ongoing needs identified either by management or other Learning & Development employees.
- Assisting in identifying performance problem areas and recommending various training methods to improve performance with the aim of translating business needs into training solutions.
- Presenting sessions to small groups covering a range of topics (e.g. products, policies, procedures, systems etc) and/or assisting in the presentation to larger groups - and ensuring that learning outcomes are achieved.
- Reviewing and assessing the effectiveness of training techniques and materials with a focus on continual improvement.
- Ensuring material is current and accurate according to company policy and procedure and external legislation/guidelines.
- Responsibility for the administrative details for Learning & Development activities including maintaining records of training activities, identifying participants, invitations, course materials/equipment and venues.
- Keeping up-to-date with external training offerings and maintaining an internal training database.

Key skills

- Strong organisational and interpersonal skills.
- Knowledge of adult learning principles and the ability to design, deliver and evaluate training.

Internal contacts

Close contact at all levels within the organisation.

External contacts

Educational and Training Institutes, Training Consultancies.

Typical experience

At least 2 - 3 years of experience in Learning & Development, coupled with a relevant tertiary qualification.

Other comments

Alternate Title: Training Officer.

Position Description

Position title: Business Analysis Manager
Position code: 18265
Level: 5

Responsible for

Ensuring delivery of multiple business systems enhancements and process transformation initiatives including process, technology, strategy and people elements as part of a holistic solution to optimise system usage, running costs and efficiency.

Report to

Senior Manager - Applications Services, IT Manager (Division/Region).

Supervises

Business Analysts, Process Analysts, Consultants.

Main activities

- Ensuring technology initiatives meet quality assurance, risk management and process improvement criteria consistent with best practice methodologies and regulatory requirements.
- Initiating multiple simultaneous business systems projects and managing them through development, implementation, training and post-implementation review.
- Managing the distribution of business/process analyst resources across several simultaneous projects.
- Ensuring backup of key project resources, taking corrective action if a project is in difficulty.
- Maintaining short and long term plans for the business system components (modules), including preparation of budgets.
- Managing operational relationships with key business partners/stakeholders affected by system upgrades/enhancements.
- Establishing, managing and reporting on the project budget, analysing budget variances and recommending appropriate action.

Key skills

- Extensive knowledge of the organisation's business.
- Exceptional project management skills.
- Effective communication skills.
- Ability to translate business requirements into practical solutions.
- Understanding of process improvement methods and tools such as six sigma, process modelling and workflow automation.

Internal contacts

Users/Business Managers, Applications and Systems Team.

External contacts

Vendors of Hardware, Services of Software.

Typical experience

At least 10-15 years of experience, including experience in business analysis, process re-engineering, project management, with tertiary level qualifications in Business, Science, Engineering or Economics.

Other comments

This position is often aligned with a distinct business unit/operational area of the business. Alternative Title: Business Systems/Process Manager.

Position Description

Position title: Senior Business Analyst
Position code: 18270
Level: 4

Responsible for

Acting as the pivot or intermediary between end-users and IT to ensure that business/user requirements are delivered in IT solutions.

Report to

Business Analysis Manager.

Supervises

No supervisory responsibilities.

Main activities

- Meeting with user groups to gather and analyse end user requirements.
- Analysing workflow to create process maps and isolate areas of potential improvement.
- Developing functional specifications that design and document desired outcome of system enhancement/development.
- Producing technical specifications to communicate user requirements in technical terms to analyst programmers/project team.
- Coordinating User Acceptance Testing (UAT) to ensure the overall efficiency, functionality and user friendliness of system enhancement/development.
- Preparing material and providing training and assistance to end-users following implementation.
- Working as a crucial component of a project team responsible for enhancing existing systems or developing new systems.

Key skills

- Strong ability to converse with both end-users and IT employees at all levels of the organisation.
- Strong understanding of all aspects of the systems/software development lifecycle.
- Technical knowledge of programming, system design, IT infrastructure and database concepts.
- Excellent communication skills, both written and verbal.
- Outstanding ability to analyse, isolate and interpret business needs and develop appropriate technical solutions.
- Outstanding technical specification writing/documentation skills.
- An appreciation of both IT and business strategy.
- Strong customer service focus.

Internal contacts

Users, Applications Services, Database Administrators, Helpdesk, IT Training, Project Managers.

External contacts

Vendors and Suppliers.

Typical experience

At least 5-7 years of experience in IT, with at least 3 years experience in a business environment, coupled with tertiary level qualifications in Business, Science, Engineering or Economics.

Other comments

Position Description

Position title: Business Analyst
Position code: 18275
Level: 3

Responsible for

Acting as the pivot or intermediary between end-users and IT to ensure that business/user requirements are delivered in IT solutions.

Report to

Business Analysis Manager.

Supervises

No supervisory responsibilities.

Main activities

- Meeting with user groups to gather and analyse end user requirements.
- Analysing workflow to create process maps and isolate areas of potential improvement.
- Developing functional specifications that design and document desired outcome of system enhancement/development.
- Producing technical specifications to communicate user requirements in technical terms to analyst programmers/project team.
- Coordinating User Acceptance Testing (UAT) to ensure the overall efficiency, functionality and user friendliness of system enhancement/development.
- Preparing material and providing training and assistance to end-users following implementation.
- Working as a crucial component of a project team responsible for enhancing existing systems or developing new systems.

Key skills

- Strong ability to converse with both end-users and IT employees at all levels of the organisation.
- Good understanding of all aspects of the systems/software development lifecycle.
- Technical knowledge of programming, system design, IT infrastructure and database concepts.
- Excellent communication skills, both written and verbal.
- Sound ability to analyse, isolate and interpret business needs and develop appropriate technical solutions.
- Sound technical specification writing/documentation skills.
- An appreciation of both IT and business strategy.
- Strong customer service focus.

Internal contacts

Users, Applications Services, Database Administrators, Helpdesk, IT Training, Project Managers.

External contacts

Vendors and Suppliers.

Typical experience

At least 3-5 years of experience in IT, with at least 2 years experience in a business environment coupled with tertiary level qualifications in Business, Science, Engineering or Economics.

Other comments

Position Description

Position title: Junior Business Analyst
Position code: 18280
Level: 2

Responsible for

Developing skills as the pivot or intermediary between end-users and IT to ensure that business/user requirements are delivered in IT solutions.

Report to

Senior Business Analyst, Business Analysis Manager.

Supervises

No supervisory responsibilities.

Main activities

- Meeting with user groups to gather and analyse end user requirements.
- Analysing workflow to create process maps and isolate areas of potential improvement.
- Developing functional specifications that design and document desired outcome of system enhancement/development.
- Producing technical specifications to communicate user requirements in technical terms to analyst programmers/project team.
- Coordinating User Acceptance Testing (UAT) to ensure the overall efficiency, functionality and user friendliness of system enhancement/development.
- Preparing material and providing training and assistance to end-users following implementation.
- Working as a crucial component of a project team responsible for enhancing existing systems or developing new systems.

Key skills

- Ability to converse with both end-users and IT employees at all levels of the organisation.
- Good understanding of all aspects of the systems/software development lifecycle.
- Technical knowledge of programming, system design, IT infrastructure and database concepts.
- Excellent communication skills, both written and verbal.
- Good ability to analyse, isolate and interpret business needs and develop appropriate technical solutions.
- Good technical specification writing/documentation skills.
- An appreciation of both IT and business strategy.
- Strong customer service focus.

Internal contacts

Users, Applications Services, Database Administrators, Helpdesk, IT Training, Project Managers.

External contacts

Vendors and Suppliers.

Typical experience

At least 2 years of experience in IT, with experience in a business environment, coupled with tertiary level qualifications in Business, Science, Engineering or Economics.

Other comments

Position Description

Position title: Senior Data Centre Operator
Position code: 18240
Level: 2

Responsible for

Operating the computer to ensure the timely completion of either more urgent, more complex or specialised assignments, as per user requirements.

Report to

Shift Manager.

Supervises

May mentor Data Centre Operators.

Main activities

- Monitoring operator consoles and responding to system requests and messages.
- Undertaking the more urgent, more complex or specialised assignments.
- Operating printers, distributing paper to the output area, and cleaning the equipment.
- Handling first level user problems reporting via the Helpdesk and passing on second level problems to Systems Programmers.

Key skills

- Good organisational skills, together with an aptitude for routine care of equipment.
- A proven record of accuracy and timely production of reports.

Internal contacts

Users.

External contacts

Limited external contacts, Suppliers of third level Support.

Typical experience

At least 3-5 years of experience in Operations/Data Centre within a large, corporate environment. Will have completed operational courses and on the job training.

Other comments

Often required to work in a 24x7/extended hours roster environment.

Position Description

Position title: Data Centre Operator
Position code: 18245
Level: 2

Responsible for

Operating the data centre to ensure the timely completion of assignments as per user requirements.

Report to

Shift Team Leader/Manager.

Supervises

No supervisory responsibilities.

Main activities

- Monitoring operator consoles and responding to system requests and messages.
- Operating laser printers, including mounting and aligning paper, distributing paper to the output area, and cleaning the equipment.
- Operating tape and cartridge drives, including mounting tapes and cartridges as requested, filing tapes and cartridges and cleaning the equipment.
- Handling first level user problems reporting via the Helpdesk and passing on second level problems to Systems Programmers.

Key skills

- Good organisational skills, together with an aptitude for routine care of equipment.

Internal contacts

Users.

External contacts

Limited external contacts, Suppliers of third level Support.

Typical experience

At least 2-3 years experience in data computer operations. Will have completed operational courses and on-the-job training.

Other comments

Often required to work in a 24x7/extended hours roster environment. Alternative Titles: Operator

Position Description

Position title: Senior Operations Support Analyst
Position code: 18255
Level: 3

Responsible for

Providing technical support to data centre operations.

Report to

Data Centre Manager.

Supervises

May mentor Operations Support Analysts.

Main activities

- Determining and resolving problems at the second level.
- Coordinating the Problem and Change Management systems
- Ensuring the backup of on-line data
- Ensuring development, testing, documentation and implementation of critical recovery procedures
- Managing all hardware installations, maintenance and problems
- Providing efficient DASD and tape management administration

Key skills

- Knowledge of equipment malfunction procedures and performance reporting.

Internal contacts

Users, Systems and Network Specialists

External contacts

Vendors of Hardware, Storage Systems

Typical experience

At least 6 years of experience in data centre operations, with at least 2 years in a large IT site

Other comments

Alternative Titles: Production Support Supervisor; Operations Support Analyst.

Position Description

Position title: Operations Support Analyst
Position code: 18260
Level: 2

Responsible for

Solving operational problems, operational change projects and undertaking other Support activities.

Report to

Data Centre Manager.

Supervises

No supervisory responsibilities.

Main activities

- Carrying out second level problem determination and resolving operating system problems.
- Developing and documenting procedures for data centre operations.
- Liaising with Equipment Suppliers in relation to hardware problems, installations and maintenance.
- Administering DASD and tape management systems.
- Coordinating Problem and Change Management systems.

Key skills

- Ability to diagnose and rectify system malfunctions.
- Good organisational skills.

Internal contacts

Users, Systems and Network Specialists.

External contacts

Vendors of Hardware, Storage Systems.

Typical experience

At least 2-3 years of experience in data centre operations in a large IT site. Will have completed appropriate training courses.

Other comments

Alternative Titles: Production Support Specialist; Operations Support Officer.

Position Description

Position title: IT Support Manager
Position code: 18145
Level: 5

Responsible for

Overall coordination and management of all aspects of IT Support to ensure service quality to end-users/clients is maintained at high levels.

Report to

Senior Manager - IT Services/Infrastructure, Manager Information Services.

Supervises

Helpdesk Manager, LAN Support Manager, IT Training Manager.

Main activities

- Establishing service level agreements for IT support.
- Ensuring systems, policies and procedures are in place to ensure seamless IT support is provided to all users.
- Ensuring seamless communication and escalation points are maintained between Helpdesk, Desktop, LAN and WAN support.
- Monitoring expenses and reporting on any variances in the IT Support budget to Senior Management.
- Promoting occupational health and safety in the IT environment.
- Providing necessary IT training and end-user education services.

Key skills

- Strong experience in coordinating IT Support at all levels.
- Strong understanding of workflow and systems.
- Excellent communication skills, both written and verbal.
- Absolute focus on service to users.
- Excellent people management and leadership skills.

Internal contacts

User Groups, Applications Groups, Systems Specialists.

External contacts

Suppliers/Vendors.

Typical experience

At least 8 years of experience in IT Support, with several years of management experience, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Senior Desktop Support Analyst
Position code: 18160
Level: 3

Responsible for

Providing Desktop support to users associated with operating installed hardware and software according to Service Level Agreements.

Report to

Desktop Support Team Leader/Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing telephone and face to face technical support to users regarding Desktop issues.
- Following agreed procedures, respond to requests for assistance by providing information to enable users to resolve their problems.
- Maintaining accurate log entries of fault with resolution and contact details.
- Ensuring all hardware/software installations and routine upgrades are implemented according to Service Level Agreements.
- Providing the business with a professional service by ensuring requests are regularly updated and realistic resolution times are provided.
- Working on most assigned tasks without referral back to Team Leader.
- Providing an effective interface between users and service providers supplying all necessary diagnostic information according to procedures.
- Ensuring technical queries not progressing are escalated to Network Engineers according to established procedures.
- Participating in ongoing team training.

Key skills

- Strong technical knowledge of Desktop hardware and software.
- Strong analytical and problem solving skills.
- Good time management and communication skills.
- Ability to manage multiple problems at once and prioritise issues.
- Strong customer service focus.
- Strong knowledge of the organisation's Standard Operating Environment (SOE).

Internal contacts

Helpdesk, Users, Applications, Network Engineers.

External contacts

Suppliers/Vendors.

Typical experience

At least 3-5 years of relevant IT Support experience coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Desktop Support Analyst
Position code: 18165
Level: 2

Responsible for

Providing second level Desktop support to users associated with operating installed hardware and software.

Report to

Desktop Support Team Leader/Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing telephone and face to face technical support to users regarding Desktop issues.
- Following agreed procedures, respond to requests for assistance by providing information to enable users to resolve their problems.
- Maintaining accurate log entries of fault with resolution and contact details.
- Ensuring all hardware/software installations and routine upgrades are implemented according to Service Level Agreements.
- Providing the business with a professional service by ensuring requests are regularly updated and realistic resolution times are provided.
- Working on tasks as assigned by Team Leader.
- Providing an effective interface between users and service providers supplying all necessary diagnostic information according to procedures.
- Ensuring technical queries not progressing are escalated to Network Engineers according to established procedures.
- Participating in ongoing team training.

Key skills

- Sound technical knowledge of Desktop hardware and both standard and customised (in-house) software.
- Sound analytical and problem solving skills.
- Good time management and communication skills.
- Ability to manage multiple problems at once and prioritise issues.
- Strong customer service focus.
- Sound knowledge of the organisation's Standard Operating Environment (SOE).

Internal contacts

Helpdesk, Users, Applications, Network Engineers.

External contacts

Suppliers/Vendors.

Typical experience

At least 2-3 years of relevant IT Support experience coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Helpdesk Manager
Position code: 18180
Level: 4

Responsible for

Managing the provision of first level support services to all users of an IT site.

Report to

IT Support Manager, Senior Manager - IT Services/Infrastructure.

Supervises

Helpdesk Operators.

Main activities

- Providing advice to management regarding the capabilities and operational status of all first level support.
- Providing general advice to Team Leaders and handling escalated client problems, queries and complaints in an effective and timely manner.
- Monitoring all problems reported to the Helpdesk.
- Liaising with equipment maintainers regarding the progress of their action on assigned problems.
- Managing the production of records reflecting Helpdesk and job stream statistics in a timely manner.
- Ensuring all problems are logged and kept current via a problem management system.
- Developing the Helpdesk members.

Key skills

- Detailed understanding of Help Desk/Customer Support process.
- Demonstrated leadership skills.
- Demonstrated commitment to the provision of excellent customer support.
- Ability to work within targets and deadlines and with minimum supervision.
- Ability to display customer empathy.
- Good oral and written communication skills.
- People management within a shift environment.
- Ability to identify and report ongoing opportunities for service improvement.

Internal contacts

Individual Users, Desktop/LAN Support.

External contacts

Suppliers of third level support.

Typical experience

At least 5-7 years experience in IT Support, with at least 2 years as a Helpdesk Team Leader.

Other comments

Position Description

Position title: Senior Helpdesk Support
Position code: 18190
Level: 2

Responsible for

Providing friendly and efficient first level support to all users of IT systems.

Report to

Helpdesk Team Leader, Helpdesk Manager.

Supervises

May mentor Helpdesk Support

Main activities

- Providing technical advice to other Helpdesk Operators and may help supervise staff.
- Resolving client problems, queries and complaints in an effective and timely manner. Monitoring all problems reported to the Helpdesk.
- Ensuring all users know the current status of their individual problems.
- Monitoring all problems reported to the Helpdesk.
- Liaising effectively with Suppliers.
- Logging and keeping current all problems via a Problem Management System.
- Producing records reflecting Helpdesk and job stream statistics in a timely manner and monitoring call volumes to avert potential escalation problems.
- Liaising with operators regarding potential problems and with Equipment Maintainers regarding the progress of their action on assigned problems.
- Coordinating and updating the Helpdesk Manual.

Key skills

- Ability to work as a member of a team.
- Ability to work without supervision.
- Good oral and written communication skills.
- Good skills in personal work organisation.

Internal contacts

Individual Users.

External contacts

Suppliers of third level support.

Typical experience

At least 2 years experience in IT Support coupled with relevant IT qualifications.

Other comments

Alternative Title: Senior Helpdesk Officer.

Position Description

Position title: Helpdesk Support
Position code: 18195
Level: 1

Responsible for

Providing friendly and efficient first level support to all users of IT systems.

Report to

Helpdesk Team Leader, Helpdesk Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing first level technical advice to users on personal computer hardware and software.
- Resolving client problems and queries in an effective and timely manner.
- Ensuring all users know the current status of their individual problems.
- Monitoring all problems reported to the Helpdesk.
- Liaising effectively with Suppliers.
- Logging and keeping current all problems via a Problem Management System.
- Producing records reflecting Helpdesk and job stream statistics in a timely manner and monitoring call volumes to avert potential escalation problems.
- Liaising with Network Engineers regarding the progress of their action on assigned problems.
- Coordinating and updating the Helpdesk Manual.
- Keeping Management aware of potential areas for product enhancement and educational requirements. Liaising with Managers/Supervisors regarding potential problems.

Key skills

- Ability to work as a member of a team.
- Ability to work without supervision.
- Good oral and written communication skills.
- Good organisational skills.

Internal contacts

Individual Users.

External contacts

Typically None.

Typical experience

Represents an entry level position in IT Support, employee will have or be working towards relevant technical qualifications.

Other comments

Position Description

Position title: Team Leader - Systems Administrator/Applications Support
Position code: 18209
Level: 4

Responsible for

Leading and directing the technical capability and support for the designated portfolio (Corporate Applications/Core Applications Support). To ensure systems/infrastructure operate at optimal efficiency.

Report to

Manager, Systems Management/Infrastructure

Supervises

System Administrators/ System Support Engineers

Main activities

- Provides technical advice and support for enterprise systems
- Manages and provides systems support, pro-actively managing the systems and infrastructure to meet business needs
- Provides/Co-ordinates implementation of solution requests required by projects
- Monitors and performs capacity planning/security audits of the systems
- Researches, evaluates and recommends new products for the improvement of Systems and Infrastructure
- Plans, co-ordinates, develops and monitors work of the team

Key skills

- Specialised skills as subject matter expert (Corporate Applications/Core Applications Support) in addition to broad skills and understanding of multiple infrastructure platforms
- Advanced skills in performance monitoring
- An understanding of systems integration middleware

Internal contacts

All users, other Systems/Infrastructure specialists, IT Management

External contacts

External suppliers, vendors, distributors, service providers and contractors

Typical experience

At least 8 years of experience in IT, with at least 3 years of experience concentrating on infrastructure/networking management, coupled with tertiary level qualifications in computer science, technology, engineering or a related discipline.

Other comments

The qualification/experience required will need to reflect the technology skill set / portfolio specified, ie. Corporate Applications/Core Applications Support. Alternative title: Team Leader, Corporate Applications/Core Applications Support

Position Description

Position title: Senior Systems Administrator
Position code: 18210
Level: 4

Responsible for

Maintaining the operational effectiveness of an organisation's systems/networks.

Report to

General Manager - IT Services/Infrastructure.

Supervises

No formal supervisory responsibilities, but may mentor Systems Administrators.

Main activities

- Ensuring hardware/software applications and network components are operational.
- Controlling user log-on and registration requirements.
- Monitoring, tuning and performing trend analysis of the System/Network performance.
- Contributing to the development of operational procedures.
- Producing and acting on security violation reports.
- Maintaining the Information System Disaster Recovery Manual and coordinating contingency tests.
- Acting as the final point of escalation for networks faults.

Key skills

- Specialist skills in all aspects of systems administration.
- Highly developed skills in troubleshooting.
- Good project management and communication skills.
- Specialist knowledge of security policies and procedures.

Internal contacts

All Users, Networking Project Teams, Technical Support department.

External contacts

Vendors of Hardware, Service and Software.

Typical experience

At least 5-7 years of commercial IT experience, specialising in Systems Administration.

Other comments

Position Description

Position title: Systems Administrator
Position code: 18215
Level: 3

Responsible for

Maintaining the operational effectiveness an of organisation's systems/networks.

Report to

Senior Manager - IT Services/Infrastructure.

Supervises

No supervisory responsibilities.

Main activities

- Ensuring hardware/software applications and network components are operational.
- Controlling user log-on and registration requirements.
- Monitoring, tuning and performing trend analysis of the System/Network performance.
- Contributing to the development of operational procedures.
- Producing and acting on security violation reports.
- Maintaining the Information System Disaster Recovery Manual and coordinating contingency tests.

Key skills

- A capacity for systematic analysis.
- Strong troubleshooting skills.
- Excellent communication skills.
- Thorough knowledge of security policies and procedures.

Internal contacts

All Users, Networking Project Teams, Technical Support department.

External contacts

Vendors of Hardware, Service and Software.

Typical experience

At least 2 years of experiences in IT Support, Networking and Systems Administration.

Other comments

Position Description

Position title: Systems Administration Analyst
Position code: 18220
Level: 2

Responsible for

Technical management of all internal systems.

Report to

Senior Systems Administrator.

Supervises

No supervisory responsibilities.

Main activities

- Analysing and developing of system requirements and specifications including resolution of current system problems and planning for future requirements.
- Estimating of costs of system hardware/software changes including competitive analysis of future requirements.
- Carrying out all daily administration matters, including monitoring system performance, ensuring successful backup procedures and developing/implementing disaster recovery.
- Managing the distribution of information on storage devices, including authorisations and disc management levels.
- Ensuring security of all systems both internally and externally including the Internet.
- Ensuring system standards are developed and observed.
- Installation and/or project management in implementation of hardware/software updates and changes.
- Providing technical support expertise and internal help services to all system users.

Key skills

- Technical ability to install and upgrade all hardware and software including networks.
- Debugging and programming to solve software problems.
- Sound analytical and problem solving skills.
- Ability to quickly learn and implement new technologies.

Internal contacts

Development, Management (all groups).

External contacts

Suppliers and software/hardware vendors.

Typical experience

At least 3-5 years systems administration and 1-2 years programming.

Other comments

Position Description

Position title:	IT General Manager (Business Unit/Region)
Position code:	18005
Level:	6

Responsible for

Ensuring the effective and efficient operational delivery of technology services to a division/business unit of the organisation or to a defined geographic area.

Report to

Chief Information Officer.

Supervises

Project Managers, IT employees within the defined division/business unit or region.

Main activities

- Implementing a technology capability and framework that will support the efficient and flexible delivery of technology services to the business unit/division or regional area.
- Providing input as part of the IT Management team in formulating and fine-tuning the organisation's overall IT strategy - accepting direction from Chief Information Officer.
- Developing and implementing operational IT plans within the division/region that execute the organisation's overall IT strategy.
- Ensuring the implementation of IT Strategy remains in alignment with other divisions/regions and in accordance with best practice for quality, project and change management.
- Assuring the provision of all IT services to the division/region and moving continually towards best practice with respect to cost, quality and service.
- Developing, deploying and managing the ongoing maintenance/support of all infrastructure technology, applications and services across the division/region.
- Maintaining management responsibility for all IT employees within the division/region, maximising their job satisfaction and monitoring performance and learning and development requirements.
- Ensuring IT projects affecting the division/region are delivered to time, cost and progress is tracked, communicated and escalated as necessary
- Managing the division/region's IT budget and reporting variances to Chief Information Officer/Senior Management.
- Introducing and maintaining professional disciplines, structures, accountabilities, standards and procedures

Key skills

- A commercial mindset with experience implementing IT strategies.
- Financial management accountability and skills to manage a significant IT budget.
- Strong management skills in the areas of leadership, supplier relations, planning and consultancy, development, delivery and support, business management.
- Strong project management skills.
- Experience managing a diverse range of infrastructure environments.
- A solid understanding of applications with demonstrated experience integrating core business systems.
- An excellent understanding of the business requirements/IT deliverables demanded by the division/region.
- Excellent communication skills, both written and verbal.

Internal contacts

Line Management, Senior Management, IT Shared Services, Project Management.

External contacts

IT Contractors, Suppliers, Vendors.

Typical experience

At least 10 years of experience in Information Technology coupled with relevant tertiary qualification. Typically has extensive

management experience coupled with 'hands-on' IT experience.

Other comments

This role is primarily focused on operational delivery with some input to overall IT strategy. This position manages all facets of IT for a division or region of the organisation. (Different organisations will allocate management according to either function or area/location).

Position Description

Position title: Team Leader - Applications Development
Position code: 18069
Level: 4

Responsible for

Coordinating/managing the design, development and maintenance of applications software and leading the applications development team.

Report to

General Manager - Applications Services.

Supervises

Senior Analyst Programmer, Analyst Programmer, Programmer, Associate Programmer.

Main activities

- Estimating, scheduling and ensuring that all resources planning requirements are sufficient to provide the required levels of availability and support.
- Setting the direction for the additional development tools used for applications development.
- Seeking out future business needs for IT applications and equipment and submitting capacity plans in a proactive manner.
- Reporting on the progress of administration and applications development against time frames and budget.
- Overseeing the administration and efforts and standards of all applications development staff and providing guidance where required.
- Managing client expectations through the administration and development process, ensuring all stages are fully met.
- Providing technical mentoring and guidance to less experienced members of applications development team.

Key skills

- Communication skills.
- Excellent consulting skills.
- Supervisory and management skills.
- Advanced skills in one or more of the major programming languages (either 'legacy' or 'hot') such as Cobol, C++, Visual Basic, .NET, XML, ASP, COM/DCOM, Pick, UniVerse, SB+ and/or SQL.
- Advanced skills and knowledge of one of the major relational database packages such as Oracle, SQL Server, Sybase or DB2.
- Knowledge in open source programming.

Internal contacts

Users and user groups, development team members.

External contacts

Vendors of hardware and software.

Typical experience

7+ years in software development, with at least 3 years general IT experience coupled with tertiary qualifications in computer science or a related discipline.

Other comments

Position Description

Position title: Senior Developer
Position code: 18070
Level: 4

Responsible for

Developing and maintaining applications software. Approximately one third of the employee's time will be spent writing code/programming.

Report to

Project Manager, Applications Development Team Leader

Supervises

May mentor Analyst Programmers.

Main activities

- Leading Project Development teams, including planning, controlling and reporting on progress.
- Designing, coding, testing and installing applications programs either in one major language or in a range of programs across multiple platforms.
- Developing operating and system documentation.
- Working with users to evaluate IT applications and equipment requirements.
- Ensuring that systems are developed within agreed budgets and time frames and achieving necessary design and systems security standards.

Key skills

- Advanced skills in one or more of the major programming languages (either 'legacy' or 'hot') such as Cobol, C++, Visual Basic, Java, XML, ASP, COM/DCOM and/or SQL development tools.
- Advanced skills and knowledge of one of the major relational database packages such as Oracle, SQL Server, Access, Sybase or DB2.
- Ability to understand the essential needs of Users and meet these in well-designed programs.
- Good skills in time and resource management.

Internal contacts

Users and User groups, Development Team Members.

External contacts

Vendors of Hardware and Software.

Typical experience

7+ years in Software Development, with at least 3 years in a large IT site, coupled with tertiary qualifications in Computer Science or a related discipline.

Other comments

Alternative Titles: Technician; Applications Supervisor; Systems Analyst.

Position Description

Position title: Developer
Position code: 18075
Level: 3

Responsible for

Developing and maintaining applications software.

Report to

Project Leader, Applications Development Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Designing, coding, testing and installing applications Programs up to 75% of the time, either in one major Program or a range of Programs across multiple platforms.
- Preparing and maintaining systems and Program documentation.
- Assisting in the analysis and design of applications Programs and databases.
- Modifying and troubleshooting applications Programs.
- Liaising with users.

Key skills

- Developed skills in one or more of the major programming languages (either 'legacy' or 'hot') such as Cobol, C++, Visual Basic, Java, XML, ASP, COM/DCOM and/or SQL development tools.
- Developed skills and knowledge of one of the major relational database packages such as Oracle, SQL Server, Access, Sybase or DB2.
- Good skills in personal work organisation and time management.

Internal contacts

Users and user groups, development team members.

External contacts

Vendors of Hardware and Software.

Typical experience

3+ years of experience in Programming and Applications Design, with a minimum of 2 years in a large IT site, coupled with tertiary qualifications in Computer Science or a related discipline.

Other comments

Position Description

Position title: IT Project Manager (Large)
Position code: 18020
Level: 6

Responsible for

Managing the end-to-end delivery of large Information Technology projects, encompassing both Applications and Infrastructure, that require a high level of project integration.

Report to

Project Director/Program Manager.

Supervises

Project Team Leaders, project employees.

Main activities

- Establishing and managing effective project operations to deliver quality outcomes.
- Managing a team(s) of project employees operating on complex/large IT projects, typically in a complex, multi-platform technical environment.
- Controlling project design and planning activities associated with large, complex applications and infrastructure development projects.
- Defining, sourcing and managing necessary project resources.
- Controlling project schedules to ensure that necessary modules and programs are completed according to the project plan.
- Preparing project budgets, attaining necessary approvals in a timely manner and monitoring project financials while monitoring and tracking project financials and the realisation of defined project benefits.
- Effectively controlling and managing the issues, risks, dependencies and changes in scope associated with large, complex IT projects.
- Establishing, managing and reporting on project budget(s), analysing budget variances and recommending appropriate action.
- Exceeding stakeholder expectations through the application of stakeholder management disciplines.
- Developing and managing vendor contracts/agreements associated with projects under management.

Key skills

- Strong understanding and application of Project Management competencies including scope, time, costs, quality, HR, communications, risk, procurement, and integration.
- Strong understanding and application of change management competencies.
- Effective leadership, coordination, motivational, Negotiation and dispute resolution skills.
- Strong understanding of business requirements and technical limitations as determined by the organisation's enterprise architecture.
- Ability to apply analytical skill and conceptual thinking to operations and system planning across a range of technologies.
- Negotiation and dispute resolution skills.
- Financial literacy to forecast and manage project budgets.
- Ability to manage the competing demands of multiple, simultaneous projects.
- Strong skills with Microsoft Office tools particularly Excel, Word, PowerPoint and Project.
- Ability to influence and build productive relationships with industry providers and stakeholders.

Internal contacts

IT Executive, Line Management, User Groups, Finance and Administration, Human Resources, IT Infrastructure.

External contacts

Consultants, Contractors, Hardware and Software Vendors.

Typical experience



Financial Institutions of New Zealand Survey

At least 10 years of experience in Information Technology, with at least 5 years of IT Project Management, coupled with tertiary level qualifications in Computer Science, Business or an associated discipline. May have formal project management qualifications.

Other comments

Project Managers matched to this role must be 'generalists', managing projects that encompass all facets of IT (i.e. - Applications and Infrastructure).

Position Description

Position title:	IT Project Manager (Medium)
Position code:	18025
Level:	5

Responsible for

Managing the end-to-end delivery of small to medium sized Information Technology projects, encompassing both Applications and Infrastructure.

Report to

Project Director/Program Manager.

Supervises

Project Team Leaders, Project employees.

Main activities

- Establishing and managing effective project operations to deliver quality outcomes
- Managing a team(s) of project employees operating on small to medium sized IT projects, typically in a complex, multi-platform technical environment.
- Controlling project design and planning activities associated with small to medium sized applications and infrastructure development projects.
- Defining, sourcing and managing necessary project resources.
- Controlling project schedules to ensure that necessary modules and programs are completed according to the project plan.
- Preparing project budgets , attaining necessary approvals in a timely manner and monitoring project financials and the realisation of defined project benefits.
- Effectively controlling and managing the issues, risks, dependencies and changes in scope associated with IT projects
- Establishing, managing and reporting on project budget(s), analysing budget variances and recommending appropriate action.
- Exceeding stakeholder expectations through the application of stakeholder management disciplines
- Developing and managing vendor contracts / agreements associated with projects under management

Key skills

- Sound understanding and application of Project Management competencies including scope, time, costs, quality, HR, communications, risk, procurement, and integration
- Sound understanding and application of change management competencies.
- Effective leadership, coordination, motivational, negotiation and dispute resolution skills
- Sound understanding of business requirements and technical limitations as determined by the organisation's enterprise architecture.
- Ability to apply analytical skill and conceptual thinking to operations and system planning across a range of technologies.
- Financial literacy to forecast and manage project budgets.
- Strong skills with Microsoft Office tools particularly Excel, Word, PowerPoint and Project.
- Ability to influence and build productive relationships with industry providers and stakeholders.

Internal contacts

IT Executive, Line Management, User Groups, Finance and Administration, Human Resources, IT Infrastructure.

External contacts

Consultants, Contractors, Hardware and Software Vendors.

Typical experience

At least 10 years of experience in Information Technology, with at least 5 years of IT Project Management, coupled with tertiary level qualifications in Computer Science, Business or an associated discipline. May have formal project management qualifications.



Other comments

Position Description

Position title: IT Project Team Leader
Position code: 18030
Level: 4

Responsible for

Planning, organising and technically leading and controlling the completion of a key component of a development project.

Report to

Project Manager.

Supervises

Team of Development employees.

Main activities

- Coordinating documentation, design, development and testing of enhancements and new development projects.
- Controlling project schedules and ensuring that applications programs are delivered within given timeframes, meet user requirements, and are easily maintainable.
- Estimating, scheduling and planning resources for the allocated component of a development project.
- Ensuring maximum levels of productivity are achieved and maintained by individuals within project team.
- Reporting on the progress of development modules against project timeframes, milestones and budget.
- Mentoring development team and providing 'hands-on' technical leadership as required.
- Providing support and consultative advice to the Project Manager.
- Ensuring all employees within the team obtain the necessary level of training.

Key skills

- In depth knowledge of documentation, coding and testing across several different development languages.
- Proven project leadership and technical leadership skills.
- Developing project management ability.
- Ability to translate user needs into a technical solution.
- Good experience in people management and mentoring of development employees.
- Strong interpersonal and communication skills.

Internal contacts

User Groups, Finance and Administration, Project Office, IT Services.

External contacts

Contractors, Consultants, Vendors of Hardware and Software.

Typical experience

At least 5 years of experience in Information Technology, with at least 3 years in a team leadership capacity. Typically will have tertiary qualifications in Computer Science or a related discipline.

Other comments

Alternative Title: Team Leader, Project Lead/Leader.

Position Description

Position title: Project Office Administrator/Coordinator
Position code: 18040
Level: 3

Responsible for

Coordinating Project reporting and documentation across multiple projects. May work on a single project if it is quite large and/or complex.

Report to

Project Office Manager, Program Manager/Project Director.

Supervises

No supervisory responsibilities.

Main activities

- Assisting with the preparation of reports.
- Maintains project documentation using established document templates.
- Assisting with budget tracking.
- Ensuring that time sheets are logged correctly and on time for all project team members.
- Arranging project meetings as requested.

Key skills

- Well organised with good time management.
- General understanding of Project Life Cycle, Project documentation standards and methodologies employed by the organisation.
- Good written and oral communication skills.

Internal contacts

Project Managers, Project Leaders, Development Teams.

External contacts**Typical experience**

Will most likely have a clerical/non-IT background. Will have 2 - 4 years experience with at least 1 in an IT department.

Other comments

Position Description

Position title: Senior Test Manager
Position code: 18095
Level: 5

Responsible for

Managing the development and implementation of test strategies that optimise the organisation's current testing environments for maintenance, enhancement and replacement of existing systems.

Report to

Project Director, General Manager - Applications Services.

Supervises

Test Managers, Test Analysts.

Main activities

- Ownership and accountability for the provision and management of the organisation's integrated test environments.
- Managing test environments for multiple projects at the enterprise level.
- Leading the delivery and implementation of consistent test environment methodologies, disciplines and processes using associated best practices across assigned lines of business.
- Managing, developing and mentoring the individual members of the Test team.
- Managing the relationship with the business customers and associated parties of the integrated test environments.
- Overseeing the continual improvement of the testing service.
- Managing risks and issues related to the provision of the testing service.
- Responsibility for people management of all individuals assigned to the testing team including performance appraisals and personal development planning.
- Periodic reporting of test environment status for all projects under management.
- Engaging external suppliers to meet test environment support requirements.

Key skills

- Strong project management skills.
- Excellent communication skills, both oral and written.
- Ability to establish strong relationships internally.
- In-depth understanding of the organisation's technology direction. This includes measurements for productivity and individual's performance.
- Track record in applying the principles of a software development life cycle.
- Strong customer focus.
- Strategic influence.

Internal contacts

Project Managers/Leaders, Users, Applications and Systems Teams.

External contacts

Vendors, Outsourcers.

Typical experience

10+ years commercial IT experience, with at least 3-5 years of experience in a leadership capacity, coupled with relevant tertiary qualifications.

Other comments

Alternative Title: Project Manager - Testing.

Position Description

Position title: Test Manager
Position code: 18100
Level: 4

Responsible for

Developing and implementing a Test strategy that optimises the organisation's current testing environments and implements solutions for maintenance, enhancement and replacement of existing systems.

Report to

Senior Test Manager.

Supervises

Test Analysts.

Main activities

- Developing and refining test processes, methodologies, disciplines and measurements across all technologies.
- Establishing good relationships with business customers.
- Actively promoting Testing principles and disciplines with business customers plus IT groups and seek feedback on effectiveness of testing processes.
- Measuring and reporting of Test results throughout the stages of the development life cycle relating to Testing as outlined in the development methodology.
- Ensuring Test environments are properly established to control and monitor end-to-end Testing of applications and infrastructure components.
- Identifying and implementing strategies to meet organisation's Testing needs, in conjunction with subject matter experts.
- Identifying, revising and enhancing adherence to processes and standards used within the Test function.
- Ensuring the Testing environment has the right tools (manual and / or automated) in place enabling practitioners to deliver a consistent and quality output.
- Identifying the Test capability required to meet current and future project demand in all the specialised technical disciplines.
- Ensuring the appropriate quality and quantity of skilled people are available.

Key skills

- Excellent communication skills, both oral and written.
- Project management skills.
- Ability to establish strong relationships internally.
- Good understanding of the organisation's technology direction. This includes measurements for productivity and individual's performance.
- Track record in applying the principles of a software development life cycle.

Internal contacts

Project Managers/Leaders, Users, Applications and Systems Teams.

External contacts

Vendors, Outsourcers.

Typical experience

5-7+ years test experience/and commercial IT experience, with at least 3 years of experience in a leadership capacity, coupled with relevant tertiary qualifications.

Other comments

Alternative Title: Project Manager - Testing.

Position Description

Position title: Senior Test Analyst
Position code: 18105
Level: 3

Responsible for

Ensuring stability, availability and reliability of production platforms and applications through the planning and execution of functionally based user testing.

Report to

Test Manager.

Supervises

No supervisory responsibilities.

Main activities

- Delivering quality application change across various platforms through analysis, planning, creation and execution of User Acceptance Test designs, cases and procedures.
- Liaising with business users, business analysts and developers to ensure that planned testing meets their requirements.
- Acquiring and analysing all relevant documents for assigned projects to determine testing requirements.
- Consulting on testing matters to business and IT project managers.
- Executing Test cases for all assigned projects/enhancements.
- Raising any defects found during test and escalating in accordance with set procedures.
- Tracking progress of allocated test designs and test cases to ensure testing deadlines will be met.

Key skills

- Strong technical documentation/interpretation skills.
- Good communication skills.
- Understanding business issues linked to the applications being tested.
- Extensive knowledge of business procedures and systems.
- Willingness to learn new technology skills to keep pace with the improvements of the testing process.
- Problem analysis skills.
- Professional presentation and approach with all personal and business interactions including direct reports, peers and management.

Internal contacts

Project managers, development teams, users.

External contacts

Typically none.

Typical experience

Solid commercial IT experience, industry knowledge and at least 3-5 years Testing experience coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Test Analyst
Position code: 18110
Level: 2

Responsible for

Ensuring stability, availability and reliability of production platforms and applications through the planning and execution of functionally based user testing.

Report to

Test Manager.

Supervises

No supervisory responsibilities.

Main activities

- Delivering quality application change across various platforms through analysis, planning, creation and execution of User Acceptance Test designs, cases and procedures.
- Liaising with business users, business analysts and developers to ensure that planned testing meets their requirements.
- Acquiring and analysing all relevant documents for assigned projects to determine testing requirements.
- Consulting on testing matters to business and IT project managers.
- Executing Test cases for all assigned projects/enhancements.
- Raising any defects found during test and escalating in accordance with set procedures.
- Tracking progress of allocated test designs and test cases to ensure testing deadlines will be met.

Key skills

- Strong technical documentation/interpretation skills.
- Good communication skills.
- Understanding business issues linked to the applications being tested.
- Extensive knowledge of business procedures and systems.
- Willingness to learn new technology skills to keep pace with the improvements of the testing process.
- Problem analysis skills.
- Professional presentation and approach with all personal and business interactions including direct reports, peers and management.

Internal contacts

Project managers, Development Teams, Users.

External contacts

Typically none.

Typical experience

Commercial IT experience, industry knowledge and at least 1-3 years IT testing experience coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Manager - Investment Analytics
Position code: Aon.INM.IA201.6
Level: 6

Responsible for

Planning and managing Research activities for a range of investment markets including equities and fixed interest.

Report to

Head of Research/ General Manager/Head of Investment Management

Supervises

Research Analysts.

Main activities

- Advising fund managers on the most appropriate asset allocation based on quantitative analyses, in line with overall investment strategy signed off by senior management.
- Managing investment Research strategies that facilitate strong investment performance.
- Providing high level reports to Head of Research specific to the relevant markets.
- Determining current and prospective value of investment portfolios.
- Developing and continually improving advanced quantitative analysis techniques.
- Applying expertise to risk management modelling and valuation practices.

Key skills

- Very strong numeric skills, often from an actuarial background.
- Good communication skills, both written and verbal.
- Strong mathematical and financial modelling skills.
- Strong analytical, consulting and persuasion skills.
- Good knowledge of funds management and investment markets.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Research Agencies.

Typical experience

10+ years of Research/Funds Management experience coupled with tertiary qualifications to post graduate level in Econometrics, Mathematics or Statistics.

Other comments

Position Description

Position title: Senior Analyst - Investment Analytics
Position code: Aon.INM.IA112.4
Level: 4

Responsible for

Providing extensive quantitative Research and information to facilitate informed investment decisions.

Report to

Manager - Investment Analytics

Supervises

May supervise Junior Research Analysts or lead a project team.

Main activities

- Advising Fund Managers on most appropriate asset allocations based on quantitative analyses.
- Planning and generating Analysis and Research specific to a designated geographic or industry sector.
- Developing and utilising predictive mathematical and financial models of designated market segments.
- Contributing to risk analyses and suggested investment strategies as required.

Key skills

- Strong numeracy and statistical abilities.
- Effective communication skills, both written and verbal.
- Strong financial and mathematical modelling skills.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Typical experience

4 - 5+ years experience in Research/Funds Management, with solid skills as a Research Analyst coupled with tertiary qualifications in Economics, Finance or Econometrics. May have post graduate qualifications.

Other comments

Position Description

Position title: Analyst - Investment Analytics
Position code: Aon.INM.IA110.3
Level: 3

Responsible for

Providing quantitative Research and information to facilitate informed investment decisions.

Report to

Manager - Investment Analytics

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated geographic or industry sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Typical experience

3-4+ years commercial experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title: Head of Investment Management
Position code: Aon.INM.IM102.6
Level: 6

Responsible for

Develop, manage and provide thought leadership to the investment management function of an organisation.

Report to

Senior Management

Supervises

Economists, Investment Managers

Main activities

- Preparing and communicating investment plans, targets and forecasts to management.
- Determining and maintaining effective operating procedures for managing funds within the organisation.
- Investigating new opportunities/areas of operation within the market to improve generation of investment income.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Strong people management skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Economists, investment managers, senior management.

External contacts

Money market institutions, stock brokers, external economical analysts, various Federal and State Government departments.

Typical experience

10 - 12+ years in reserach and investment management coupled with tertiary qualifications to post graduate level in Econometrics, Mathematics or Statistics.

Other comments

Position Description

Position title: Senior Portfolio Manager - Investment Management
Position code: Aon.INM.IM101.6
Level: 6

Responsible for

Managing a significant fund or a portfolio of funds on behalf of the organisation/client.

Report to

General Manager/Head of Investment Management

Supervises

May supervise more junior staff

Main activities

- Making decisions for allocated funds, within predetermined strategic guidelines and authority limits.
- Contributing to broader departmental decision-making on investment strategies and recommending specific policies for area of specialisation.
- Providing guidance, coaching and advice to more junior fund managers/analysts.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Good people management skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Other Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 10 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Alternative Titles: Senior Investment Manager

Position Description

Position title: Portfolio Manager - Investment Management
Position code: Aon.INM.IM101.5
Level: 5

Responsible for

Managing a portfolio of smaller funds on behalf of the organisation/client.

Report to

General Manager/Head of Investment Management or Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Making decisions for allocated funds, within predetermined strategic guidelines and authority limits.
- Contributing to departmental decision-making on investment policies for area of specialisation.
- Providing guidance, coaching and advice to analysts.

Key skills

- Excellent communication skills, both written and verbal.
- Strategic planning skills.
- Good interpersonal skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Other Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 7 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Alternative Titles: Investment Manager

Position Description

Position title: Senior Analyst - Investment Management
Position code: Aon.INM.IM112.4
Level: 4

Responsible for

Providing quantitative Research and Information to assist in the management of investments on behalf of the organisation

Report to

Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Advising Fund Managers on most appropriate investment decisions based on quantitative analyses.
- Planning and generating Analysis and Research specific to a designated geographic or industry sector.
- Developing and utilising predictive mathematical and financial models of designated market segments.
- Contributing to risk analyses and suggested investment strategies as required.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Good interpersonal skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 4-5 years of funds management experience. Tertiary qualifications in business or finance, may be studying for post-graduate level.

Other comments

Position Description

Position title: Analyst - Investment Management
Position code: Aon.INM.IM110.3
Level: 3

Responsible for

Providing quantitative Research and information to facilitate informed investment decisions.

Report to

Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated geographic or industry sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Typical experience

3-4+ years commercial experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title: Investment Support Administrator
Position code: Aon.INM.IM101.2
Level: 2

Responsible for

Conducting a variety of daily activities within the Investment Management Team.

Report to

Team Leader - Operations, Investment Management

Supervises

No Supervisory Responsibilities.

Main activities

- Conducting various functions/processes within the Investment Management Department such as clearance, futures settlements, equities processing, options clearance, orders processing, data entry, reconciliations, trade input and verification.
- Resolving problems as they arise and referring complex issues to more senior staff.
- Assisting with the investigation of unreconciled items and failed trades.

Key skills

- Developing knowledge and understanding of the functions and processes within the Operations area.
- Sound working knowledge of relevant technologies and software.

Internal contacts

Investment Specialists/Dealers, Finance and Administration Staff.

External contacts

Trade/External Associations, Regulatory Bodies.

Typical experience

Minimum 12-18 months relevant industry experience and may have tertiary qualifications in Accounting, Finance or similar. May also have SIA qualifications.

Other comments

Position Description

Position title: Senior Marketing Manager
Position code: 13005
Level: 6

Responsible for

Developing and controlling marketing strategy to achieve market share and profitability goals for either a specific industry, product or line of business.

Report to

Corporate Marketing Manager or Business Unit General Manager.

Supervises

Marketing manager, Product Managers, Marketing Analyst and Product Promotions staff.

Main activities

- Planning, developing and executing the strategic marketing and communications initiatives in close collaboration with executive leadership.
- Managing the execution of strategy to ensure resource allocation, program prioritisation and program delivery.
- Formulating and recommending appropriate marketing strategies from market intelligence and research projections.
- Monitoring market budgets, including performance against target, variance analyses and revised projections.
- Controlling pricing and volume discount policies.
- Directing market research and market intelligence data.
- Liaising with other divisions/departments.

Key skills

- Professional marketing skills are needed, in combination with a good knowledge of the special needs of an industry group and knowledge of the product's competitive strengths/potentials.
- Strong communication skills and the ability to interpret and maximise the use of sophisticated market research data.

Internal contacts

National Sales Management, Finance and Accounting, Company Secretary, Legal staff, Systems and Software Development staff.

External contacts

Advertising agencies, the media, public relations firms, market research firms, government officials.

Typical experience

Tertiary qualifications with at least 10+ years marketing and product management experience.

Other comments

Specialises in one of these areas:- Industry: marketing a relatively wide range of products to a particular industry. Products: marketing a specific product or group of products. Line of Business: marketing within segregated business units/divisions.

Position Description

Position title: Marketing Manager
Position code: 13010
Level: 5

Responsible for

Implementing and monitoring the marketing strategy to achieve market share and profitability goals for either a specific industry, product or line of business.

Report to

Corporate Marketing Manager or Business Unit General Manager, Senior Marketing Manager.

Supervises

Product Managers, Marketing Analyst and Product Promotions staff.

Main activities

- Implementing and monitoring the progress of marketing plans and advertising campaigns.
- Formulating and recommending appropriate marketing policies from market intelligence and research projections.
- Preparing and updating market budgets, regularly reporting on performance against target and providing variance analyses and revised projections.
- Recommending pricing and volume discount policies.
- Coordinating market research and market intelligence data.
- Liaising with other divisions/departments.

Key skills

- Professional marketing skills are needed, in combination with a good knowledge of the special needs of an industry group and knowledge of the product's competitive strengths/potentials.
- Strong communication skills and the ability to interpret and maximise the use of sophisticated market research data.

Internal contacts

National Sales management, Finance and Accounting staff, Company Secretary, Legal staff, Systems and Software Development staff.

External contacts

Advertising agencies, the media, public relations firms, market research firms, government officials.

Typical experience

Tertiary qualifications with at least 8-10 years marketing and product management experience.

Other comments

Specialises in one of these areas:- Industry: marketing a relatively wide range of products to a particular industry. Products: marketing a specific product or group of products. Line of Business: marketing within segregated business units/divisions.

Position Description

Position title: Senior Marketing Consultant - Generalist
Position code: 13220
Level: 4

Responsible for

Managing the development, market share and profitability of a portfolio of new and existing strategically important products and/or services.

Report to

Depending on organisation size and structure, Head of Marketing, Functional Lead of Marketing or Marketing Manager.

Supervises

May supervise Marketing Associate or Marketing Administration staff.

Main activities

- Working with line management groups to build and implement product marketing solutions in line with business needs.
- Developing go-to market strategies and tactical execution plans for a portfolio of products and/or services.
- Projecting sales forecasts, developing product budgets and reporting on actual product sales.
- Identifying new marketing opportunities and analysing competitor activity.
- Identifying new product opportunities and preparing business cases.
- Coordinating market research and product design activities in conjunction with other business functions.
- Supporting the sales team by identifying opportunities and providing product training.
- Coordinating the use of effective pricing and discount policies.

Key skills

- Excellent product knowledge
- Strong business analysis skills
- Strong communication and presentation skills

Internal contacts

Marketing, Sales, Finance, Training and Manufacturing departments of the organisation.

External contacts

Advertising agencies, market research companies, public relations companies, customers and government officials.

Typical experience

5+ years experience in marketing, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Marketing Consultant - Generalist
Position code: 13225
Level: 3

Responsible for

Managing the development, market share and profitability of a portfolio of new and existing products and/or services.

Report to

Depending on organisation size and structure, Functional Lead of Marketing or Marketing Manager.

Supervises

No supervisory responsibilities.

Main activities

- Developing go to market strategies and tactical execution plans for a portfolio of products and/or services.
- Projecting sales forecasts, developing product budgets and reporting on actual product sales.
- Identifying new marketing opportunities and analysing competitor activity.
- Identifying new product opportunities and preparing business cases.
- Coordinating market research and product design activities in conjunction with other business functions.
- Supporting the sales team by identifying opportunities and providing product training.
- Coordinating the use of effective pricing and discount policies.

Key skills

- Excellent product knowledge
- Strong business analysis skills
- Strong communication and presentation skills

Internal contacts

Marketing, Sales, Finance, Training and Manufacturing departments of the organisation.

External contacts

Advertising agencies, market research companies, public relations companies, customers and government officials.

Typical experience

3+ years experience in marketing, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Marketing Associate
Position code: 13230
Level: 2

Responsible for

Providing assistance to line management, using basic to intermediate level marketing knowledge on a broad range of marketing, programs and practices.

Report to

Depending on organisation size and structure, Head of Marketing, Functional Lead of Marketing or Marketing Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing a variety of services using covering multiple areas of marketing including product marketing, marketing communications, public relations, segment/channel marketing, marketing intelligence and technical marketing.
- Researching issues and suggesting recommendations to marketing issues.
- Assisting in the implementing of new practices and programs to meet organisational needs.
- Assisting in components of larger projects with direction from consultants and marketing managers.

Key skills

- Knowledge of marketing practices and programs
- Good communication skills and strong service orientation

Internal contacts

Marketing, Sales and Training departments of an organisation.

External contacts

Marketing consultancies, industry associations.

Typical experience

1 - 3 years experience in marketing, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Marketing Administration Assistant
Position code: 13035
Level: 2

Responsible for

Providing general administrative support to the Marketing Manager and Marketing team.

Report to

Marketing Manager.

Supervises

No supervisory responsibilities.

Main activities

- Performing an array of administrative duties, including preparation of reports and proposals, database management, written correspondence, arranging travel itineraries and bookings, word processing, typing, purchasing and screening incoming telephone calls.
- Maintaining effective electronic and hard copy filing systems
- Assisting with the coordination of Marketing events.
- Maintaining consumables stock and marketing literature for the group.
- Handling routine department enquiries and re-routing urgent matters for attention by more senior marketing employees.

Key skills

- Highly developed administration skills.
- Excellent communication skills.
- Highly organised - with ability to juggle multiple tasks.
- PC Application and broad systems knowledge e.g. Word, Excel.

Internal contacts

Sales, Customer Service/Support.

External contacts

Clients, Suppliers, Research Consultancies.

Typical experience

2+ years of Administrative experience.

Other comments

Position Description

Position title: Marketing Analyst
Position code: 13030
Level: 3

Responsible for

Conducting research studies and gathering statistical data to enable management to forecast sales and develop new products.

Report to

Marketing Manager, Product Manager.

Supervises

No supervisory responsibilities.

Main activities

- Undertaking delegated research studies.
- Analysing statistical data.
- Analysing economic and industry trends.
- Presenting detailed reports to management.
- Assisting in preparing new product launches.
- Liaising with other marketing staff.

Key skills

- Strong statistical ability.

Internal contacts

Sales Administration Manager, Advertising Manager, Sales Managers, Product Manager.

External contacts

Market Research companies, Advertising Agencies, Government Statistical Offices.

Typical experience

Tertiary qualifications in Marketing with at least 1-3 years of relevant experience.

Other comments

This position is not an entry level for a Marketing Graduate.

Position Description

Position title: Functional Lead of Marketing - Brand
Position code: 13013
Level: 6

Responsible for

Working with the senior management to create the brand vision for the organisation and ensuring effective communication internally and externally

Report to

Chief Marketing Officer

Supervises

Team of marketing professionals

Main activities

- Creating an overall brand strategy for the organisation and working with the communications department to effectively communicate this to the general public and other external stakeholders
- Planning, directing, and controlling policies and plans that attain specific image-related objectives that reinforce the overall position of products and services.
- Developing and implementing a marketing, branding, and promotional program to stimulate demand for company products or particular line of key products.
- Using market research, product analysis, and customer feedback to recognise opportunities for advancing the brand across a range of products and categories.

Key skills

- Brand management
- Marketing research
- People management
- Stakeholder management

Internal contacts

Chief Marketing Officer, Marketing department, Business Unit Heads, Function Heads

External contacts

Marketing research agencies, External consultants

Typical experience

15+ years of experience in the marketing function with at least 10+ years in brand management

Other comments

Position Description

Position title: Brand Manager - Level 3
Position code: 13015
Level: 5

Responsible for

Managing the development, market share and profitability of strategically important brands for either a particular product or industry.

Report to

Marketing Manager - Industry/Product/Line of Business.

Supervises

Marketing Associate/Analyst.

Main activities

- Coordinating market research and product design activities.
- Projecting sales forecasts and developing product budgets.
- Organising promotional campaigns and conducting seminars on product awareness according to individual company or industry needs.
- Providing product training to sales force.
- Identifying new marketing opportunities and analysing competitor activity.
- Maintaining customer contact and high level engagement.
- Complex pricing and discount policies.
- Reporting on actual product sales.
- Recommending advertising strategy and liaising closely with advertising agencies.
- Developing the marketing plan for the product lines.

Key skills

- Professional marketing skills are needed. Strong communication skills and the ability to interpret and analyse market research data.
- Exposure to product promotion and advertising as well as strong statistical background.

Internal contacts

Customer Sales management and staff, Manufacturing staff, Marketing Administration Manager, Management Accountant, Human Resources/Training Manager.

External contacts

Advertising agencies, market research companies, product promotion companies, public relations agencies, customers, government officials.

Typical experience

University degree or similar tertiary level qualification, with at least 7-10 years experience.

Other comments

This role will be developing supervisory and leadership skills for advancement to position 13010 (Marketing Manager - Career Level 5).

Position Description

Position title: Brand Manager - Level 2
Position code: 13020
Level: 4

Responsible for

Managing the development, market share and profitability of strategically important products or brands for either a particular product or industry.

Report to

Marketing Manager.

Supervises

May supervise a Marketing Assistant.

Main activities

- Developing and/or Contributing significantly to the overall marketing strategy of a specific product or product line.
- Managing product sales budgets and continually monitoring actual product performance against forecasted sales.
- Developing promotional/advertising strategies and collateral, often in conjunction with advertising agencies, that are consistent with corporate image and objectives.
- Coordinating all market research to ensure maximum target market intelligence.
- Identifying new marketing opportunities and analysing competitor activity.
- Playing a significant role in product enhancement decisions.
- Assisting in the development of complex pricing and discount policies.
- Providing product training to sales force.
- Overseeing product design and enhancement activities.

Key skills

- Strong professional marketing skills.
- Analysing and interpreting market research data.
- Excellent communication skills, both written and verbal.

Internal contacts

Sales, Customer Support, Marketing Communications, Marketing Administration, Accounting, Human Resources/Training.

External contacts

Advertising Agencies, Market Research Companies, Product Promotion Companies, Public Relations Agencies, Customers, Government Officials.

Typical experience

5-7 years commercial experience, coupled with a university degree in Business/Marketing or similar tertiary level qualification.

Other comments

Position Description

Position title: Brand Manager - Level 1
Position code: 13025
Level: 3

Responsible for

Managing the development, market share and profitability of strategically important products or brands for either a particular product or industry.

Report to

Marketing Manager.

Supervises

No supervisory responsibilities.

Main activities

- Contributing significantly to the overall marketing strategy of a specific product or product line.
- Managing product sales budgets and continually monitoring actual product performance against forecasted sales.
- Developing promotional/advertising strategies and collateral, often in conjunction with advertising agencies, that are consistent with corporate image and objectives.
- Coordinating all market research to ensure maximum target market intelligence.
- Identifying new marketing opportunities and analysing competitor activity.
- Overseeing product design and enhancement activities.
- Making recommendations towards the development of complex pricing and discount policies.

Key skills

- Strong professional marketing skills.
- Analysing and interpreting market research data.
- Excellent communication skills, both written and verbal.

Internal contacts

Sales, Customer Support, Marketing Communications, Marketing Administration, Accounting, Human Resources/Training.

External contacts

Advertising Agencies, Market Research Companies, Product Promotion Companies, Public Relations Agencies, Customers, Government Officials.

Typical experience

At least 3-5 years commercial experience, coupled with a university degree in Business/Marketing or similar tertiary level qualification.

Other comments

Position Description

Position title: Head of Product Development
Position code: Aon.MKT.PD101.6
Level: 6

Responsible for

Accountable for the overall decision making, strategic direction and investment for growth at a corporate or segment level for a Product Development unit.

Report to

General Manager/Head of Marketing

Supervises

Product Development Team

Main activities

- Manages a team of professional and technical product development staff.
- Developing and implementing the distribution of products to maximise the organisation's market opportunities.
- Contributing to the development of the overall marketing strategy by identifying, analysing and recommending new products, markets and distribution channels.
- Managing product development processes and expenditure, including research, design, development and project management of implementation.
- Monitoring and reporting on results, including volume and quality of business produced against budgeted sales targets, recommending corrective action where necessary.

Key skills

- Significant people management skills, deep technical product knowledge, excellent communication and negotiation skills.

Internal contacts

Marketing, Technical, Investment, Retail, Risk departments

External contacts

Clients (both corporate and individual)

Typical experience

10+ years experience in marketing/product development in a financial services environment, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Senior Product Development Manager
Position code: Aon.MKT.PD101.5
Level: 5

Responsible for

Development of a particular new or existing product or group of products to maximise profitability and market penetration.

Report to

Head of Product Development

Supervises

May supervise Product Development Team Members

Main activities

- Managing development or repositioning of a product or group of products, taking responsibility for managing/coordinating product development processes including research, design and implementation/launch.
- Analysing and providing recommendations on product strategy, life-cycle management, development, launch and commercialisation, .
- Monitoring and reporting on results and recommending corrective action where necessary.
- Managing a small team of Product Development Managers and Analysts.

Key skills

- Good technical product knowledge, previous experience in marketing/product management. Good communication and people management skills+L21

Internal contacts

Marketing, Technical, Investment, Retail, Risk departments

External contacts

Clients (both corporate and individual)

Typical experience

7+ years experience in marketing/product development in a financial services environment, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Product Development Manager
Position code: Aon.MKT.PD101.4
Level: 4

Responsible for

Development of a particular new or existing product or group of products to maximise profitability and market penetration.

Report to

Head of Product Development or Senior Product Development Manager

Supervises

May supervise Product Development Analysts

Main activities

- Assisting in the development or repositioning of assigned products, taking responsibility for processes including research, design and implementation/launch.
- Analysing product strategy outcomes, including results/data on life-cycle management, development, launch and commercialisation, to include target market profiles, sales and expenditure projections, impact assessments on existing products.
- Ensuring technical appraisals are carried out during development.
- Monitoring and reporting competitor product initiatives and on key sources of customer complaints, and making recommendations on improvements.
- May supervise a small team of Product Development Analysts.

Key skills

- Good technical product knowledge, previous experience in marketing/product management. Good communication and people management skills

Internal contacts

Marketing, Technical, Investment, Retail, Risk departments

External contacts

Clients (both corporate and individual)

Typical experience

4-5+ years experience in marketing/product development in a financial services environment, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Product Analyst
Position code: Aon.MKT.PD101.3
Level: 3

Responsible for

Providing analytical support to Product Development Managers in the fulfilment of product development processes.

Report to

Product Development Manager

Supervises

No supervisory responsibilities

Main activities

- Providing analytical support to Product Development Team, including maintenance and updating of systems relating to the product development pipeline.
- Through data analysis, identifying key product issues requiring resolution, and recommending actions to resolve these proactively.
- Reporting on key sources of product complaints, and identifying potential areas for improvement.

Key skills

- Good analytical skills, may have previous experience in marketing/product management. Good communication skills

Internal contacts

Marketing, Technical, Investment, Retail, Risk departments for sourcing information, IT Support

External contacts

Typical experience

2+ years experience in marketing/product development in a financial services environment, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title: Manager - Lending Operations
Position code: Aon.OPS.LO101.5
Level: 5

Responsible for

Managing the team and overseeing the loan application process within a designated area. Presenting or approving terms and ensuring ongoing loans management and control.

Report to

General Manager/ Head of Retail, or Business & Corporate Banking or Head of Operations

Supervises

Supervisors - Loans, support staff.

Main activities

- Managing the Lending Operations Team and overseeing the Lending Operations office.
- Monitoring all loan/credit applications in a selected region or area.
- Establishing customer contact.
- Investigating loan viability and securities, approving and rejecting applications (within limits of authority), arranging loan contracts and ensuring ongoing account maintenance.
- Obtaining a high level of customer service through staff performance, efficiency & productivity levels.
- Submitting for approval credit facilities outside individual authority levels.
- Monitoring existing loan procedures & advising on and, where appropriate, implementing changes to improve efficiency.
- Maintaining close contact with all major commercial institutions in the region and may promote the organisation's product range - creating & maintaining a network of loan referral contacts.
- Ensuring all commercial loan policies and procedures are strictly adhered to and being responsible for the quality and quantity of all lending paper and achievement of budgets.
- Maintaining close contact with all branch operations in the region/area.
- Achieving all ancillary product sales i.e. investments, visa and insurance.

Key skills

- Strong people management skills.
- Strong knowledge of financial and market tools.
- Good operational management skills and a record of successful implementation management.
- Good communication skills.

Internal contacts

Operations staff, Sales and Marketing staff, Finance and Administration staff.

External contacts

All major clients, commercial loan applicants, credit referees, other financial institutions, credit reference bureaus.

Typical experience

At least 7 years lending experience, most often in a branch environment.

Other comments

Alternative Titles: Lending Manager, Loans Processing Manager, Loans Structuring Manager, Manager - Loans.

Position Description

Position title: Team Leader - Lending Operations
Position code: Aon.OPS.LO101.4
Level: 4

Responsible for

Controlling and supervising the day to day activities of Lending Operations staff involved with the assessment, approval and processing of lease, credit and loan applications.

Report to

Manager - Lending Operations

Supervises

Team of support staff.

Main activities

- Organising and supervising the day to day activities of Lending Operations staff, ensuring that they adhere to policy and procedural guidelines.
- Analysing out of the ordinary loan applications referred by officers in terms of their suitability and inherent credit risks, referring decisions as required to more senior management.
- Providing training and development opportunities for staff and offering regular feedback through performance appraisal.
- Recommending loan approvals or rejections as appropriate within authority levels.
- Maintaining an efficient administration and reporting system, providing management information to superiors.
- Implementing changes to policies and procedures laid down by management.

Key skills

- Possesses strong knowledge of policies and procedures that affect the lending environment.
- Leadership and motivational skills.
- Good communication skills.

Internal contacts

Operational staff, Finance and Administration staff.

External contacts

Solicitors, Real Estate Agents, Credit Reference Bureaus and Borrowers.

Typical experience

4-5+ years experience in all aspects related to lending.

Other comments

Alternative title: Supervisor - Lending/Loans/Loan Structuring

Position Description

Position title: Senior Lending Officer
Position code: Aon.OPS.LO101.3
Level: 3

Responsible for

Successful and effective loan approvals within the levels of authority.

Report to

Manager - Lending Operations

Supervises

May supervise more junior Lending Analysts/Officers.

Main activities

- Achieving budgeting standards and being responsible for the quality and quantity of all lending paper of a higher value than other Lending Officers.
- Submitting for approval of all credit facility requests.
- Achieving all ancillary product sales budgets i.e. investments, visa and insurance etc.
- Obtaining a high customer service standard through personal performance, efficiency and productivity levels.
- Creating and maintaining a network of loan referral contacts - inclusive of solicitors and Real Estate Agents.
- Maintaining efficient administration and reporting systems.
- Counselling prospective future borrowers.
- Submitting credit facilities outside approval authority to higher levels.

Key skills

- Sound judgment of successful loan approvals.
- Excellent communication skills.

Internal contacts

Legal Advisers, Operational staff, Finance and Administration staff.

External contacts

Solicitors, Real Estate Agents, Credit Reference Bureaus and Borrowers.

Typical experience

3+ years experience in a lending/loans environment.

Other comments

Alternative Titles: Senior Credit Assessor, Senior Credit Analyst, Senior Loans Processing/Structuring Analyst/Officer

Position Description

Position title: Lending Officer
Position code: Aon.OPS.LO101.2
Level: 2

Responsible for

Assessing, approving and processing lease, credit and loan applications. Analysing their viability and credit risk within policy standards and company guidelines.

Report to

Team Leader - Lending Operations

Supervises

No supervisory responsibilities.

Main activities

- Analysing loan applications in terms of their suitability and inherent credit risks, checking all available references and nominated securities and credit scoring.
- Recommending loan approvals or rejections as appropriate within authority levels.
- Monitoring the performance of allocated accounts to ensure that bad debts are kept to a minimum.
- Maintaining an efficient administration and reporting system.
- Ancillary product sales, i.e. investments and insurance, etc.
- Creating and maintaining a network of external loan referable contacts.
- Advising management on aspects of loans applications.

Key skills

- Sound judgment in delivering credit risks.
- Good adherence to policy guidelines.
- Good administrative and procedural knowledge.

Internal contacts

Operational staff, Finance and Administration staff, Legal Advisers.

External contacts

Solicitors, Real Estate Agents, Credit Reference Bureaus and Borrowers.

Typical experience

12 - 18+ months in a lending/loans environment.

Other comments

Alternative titles: Credit Assessor, Credit Analyst, Loans Processing/Structuring Analyst/Officer.

Position Description

Position title: Manager - Loss Recovery Operations
Position code: Aon.OPS.LR201.5
Level: 5

Responsible for

Ensuring the protection of the company's investments by minimising losses, efficiently managing the receivables portfolio and improving recoveries.

Report to

General Manager/ Head of Operations Support/Transaction Services

Supervises

Collections and Loans officers, Credit Control analysts.

Main activities

- Producing accurate and timely reports to monitor accounts and identify delinquency trends, recommending corrective action.
- Supervising collection staff and establishing correction strategies to ensure efficient processing of accounts and thereby collection of delinquent amounts.
- Liaising with Consumer Affairs department, Police and Bankruptcy agencies on fraud and utilising collection agencies and solicitors as required.
- Establishing goals for delinquency/loss/bad debt numbers and performance required from section to maintain a high credit quality in the receivables book.
- Ensuring that systems documentation and procedures comply with legal/legislative requirements so as to avoid adverse litigation and loss of income.
- Assisting in the training and development of operational staff to maintain and improve the efficiency of credit control.
- Improving the efficiency of the credit process and systems continually.
- Accrediting vendors that introduce new business.

Key skills

- Strong administration skills.
- Excellent people management skills.
- Good communication skills.
- Good data processing skills.
- Proactive approach to business activity and process improvement.

Internal contacts

Legal Department, Operational staff, Finance and Administration staff, Business Development staff.

External contacts

Collection agencies, Credit reference bureaus, Credit referees, other financial institutions.

Typical experience

An extensive knowledge and understanding of credit control operations, policy and procedures in recovery. At least 7+ years relevant experience in a financial services environment

Other comments

Alternative Title: Collections Manager, Credit Control Manager.

Position Description

Position title: Team Leader - Loss Recovery Operations
Position code: Aon.OPS.LR201.4
Level: 4

Responsible for

Supervising and training staff in their role of collecting arrears and accounts thereby minimising delinquencies and resultant bad debts.

Report to

Manager - Loss Recovery Operations

Supervises

Credit Control officers

Main activities

- Arranging for the collection of delinquent amounts through the efficient supervision and guidance of staff.
- Ensuring speedy and effective recovery of amounts outstanding often dealing with repossession agents by personal and telephone contact.
- Ensuring that correct company procedures and guidelines are followed - acting as a checking officer.
- Continual training of staff in the workplace.
- Ensuring that correct accounts are credited by batching and checking individual entries.
- Trying to resolve difficult cases by liaising with Financial counsellors, Solicitors and other legal bodies.

Key skills

- Supervisory skills.
- Very good procedural knowledge.

Internal contacts

Lending Officers/staff, Operational staff.

External contacts

Difficult customers, solicitors, accountants, financial counsellors, repossession agents.

Typical experience

4 - 5+ years experience in collection of amounts outstanding.

Other comments

Alternative Title: Collections/Credit Control Supervisor.

Position Description

Position title: Senior Loss Recovery Officer
Position code: Aon.OPS.LR201.3
Level: 3

Responsible for

Commencing or continuing specialised collection action on written off amounts or accounts in arrears in order to maximise recovery of bad debt.

Report to

Team Leader - Loss Recovery

Supervises

May supervise more junior Recovery Officers.

Main activities

- Making contact with debtors and negotiating a mutually agreed arrangement for payment of arrears and finalising arrangements for repayment of debts.
- Preparing court processes, documentation and correspondence with debtors and their counsel.
- Continually updating knowledge about clients' financial affairs by analysing and evaluating information from various financial organisations.
- Conducting inquiries/searches to locate missing debtors.
- Ensuring that policy and procedures are adhered to in relation to timeframes, reconciling accounts, adjustments, charging penalty interest and fees and issuance of relevant default and property enforcement notices.

Key skills

- Advanced communication skills.
- Advanced negotiation skills.
- Ability to build relationships with a diverse range of people.
- Knowledge of legal requirements.

Internal contacts

Finance and Administration staff, Legal specialists.

External contacts

Debtors or their representatives, Solicitors and Trustees.

Typical experience

3+ years experience in a loss recovery environment.

Other comments

Alternative titles: Senior Collections/Credit Control Officer, Recoveries Consultant

Position Description

Position title: Loss Recovery Officer
Position code: Aon.OPS.LR201.2
Level: 2

Responsible for

Under supervision, commencing or continuing specialised collection action on written off amounts or accounts in arrears in order to maximise recovery of bad debt.

Report to

Team Leader - Loss Recovery

Supervises

No supervisory responsibilities.

Main activities

- Making contact with an allocated portfolio of debtors and negotiating, within pre-determined parameters, a mutually agreed arrangement for payment of arrears and finalising arrangements for repayment of debts.
- Preparing court processes, documentation and correspondence with debtors and their counsel, and submitting them for sign-off.
- Continually updating knowledge about clients' financial affairs by analysing and evaluating information from various financial organisations.
- Conducting inquiries/searches to locate missing debtors as directed.
- Ensuring that policy and procedures are adhered to in relation to timeframes, reconciling accounts, adjustments, charging penalty interest and fees and issuance of relevant default and property enforcement notices.

Key skills

- Good communication skills.
- Advanced negotiation skills.
- Ability to build relationships with a diverse range of people.
- Knowledge of legal requirements.

Internal contacts

Finance and Administration staff, Legal specialists.

External contacts

Debtors or their representatives, Solicitors and Trustees.

Typical experience

12 - 18+ months experience in collection with a good working knowledge of legislative requirements and the court process.

Other comments

Alternative titles: Collections Officer, Credit Control Officer

Position Description

Position title: Manager - Processing & Transaction Support
Position code: Aon.OPS.TS301.5
Level: 5

Responsible for

Ensuring the successful execution of operational processes in line with business objectives and the desired customer experience. Driving the successful execution of processes internally and/or by partners who may be internal or external, onshore or offshore.

Report to

General Manager/Head of Operations Support/ Transaction Services.

Supervises

May supervise Team Leaders or Operations staff.

Main activities

- Managing key operational processes and understanding the end-to-end processes, stakeholders and desired customer experience.
- Managing the key process drivers and taking action to reduce costs, improve quality and improve customer service.
- Engaging with all parties involved in the operational aspects of processes to deliver agreed customer experience, KPI's and unit costs.
- Understanding current and potential bottle necks/breakage points and taking action to eliminate and improve quality and timeliness of output.
- Managing and escalating processing errors, consistent with corporate policy.
- Providing direction on changes to processes resulting from new business initiatives or regulatory or compliance changes. Engaging all parties to ensure changes are successfully implemented.
- Ensuring the business unit and on/offshore vendors adhere to policies and procedures, regulatory and legislative requirements. Ensuring that complete and accurate documentation is maintained at all times.
- Reporting operational metrics and business drivers.

Key skills

- Strong communication skills.
- Ability to build collaborative relationships with all stakeholders.
- Ability to identify, understand and analyse issues and choose a course of action or develop an appropriate solution.
- Demonstrated ability to understand the business and customers.
- Understanding of operations processes and their relationship across the organisation both onshore and offshore.

Internal contacts

Business units involved in the operational aspects of processes.

External contacts

On and/or offshore internal and external customers.

Typical experience

7 - 10+ years experience in process and vendor management across multiple sites, coupled with relevant tertiary qualifications.

Other comments

Alternative Title: Manager, Transactional/Business Support

Position Description

Position title: Team Leader - Processing & Transaction Support
Position code: Aon.OPS.TS301.4
Level: 4

Responsible for

Managing diverse processes and ensuring adequate staffing for former back office ledger functions in the Branch Network (account maintenance and verification, deceased estates, periodical payments, list pays and reports).

Report to

Manager - Operations, Transactions, or Managers in Administration, Payroll, Accounts, Finance, Logistics, Purchasing, Human Resources or Branches.

Supervises

A team of customer service staff.

Main activities

- Ensuring all appropriate responses to customer requests are provided within specified time-frames and service levels.
- Monitoring service levels for account process functions, report completion and resolution of customer complaints
- Maximising staff performance levels and job satisfaction to achieve and maintain agreed target levels for turnover and morale.
- Planning and implementing change initiatives and monitoring results to maximise benefits.
- Ensuring that policies and procedures comply with company policy and legislation, including rectification of deficiencies and resolution of any issue(s).
- Developing and implementing process improvements to achieve customer service level enhancements.

Key skills

- High conceptual/analytical ability, coaching skills, ability to plan and organise.

Internal contacts

Branch Managerial/Supervisory staff.

External contacts

Customers, Clients and Suppliers.

Typical experience

4-5+ years experience in customer service/banking.

Other comments

Alternative Title: Supervisor, Transactional/Business Support

Position Description

Position title: Senior Processing & Transaction Support Officer
Position code: Aon.OPS.TS301.3
Level: 3

Responsible for

Providing transactional support for the organisation and internal Departments/Teams.

Report to

Team Leaders/ Managers

Supervises

No supervisory responsibilities.

Main activities

- Handling complete segments of a Branch or Department's transactional work without supervision.
- Maintaining all processing as required.
- Drafting of correspondence as required.
- Collating reports and statistical information within area of assigned activity.
- Resolving discrepancies and handling difficult exceptions, recognising problem areas as they arise and making recommendations to group leader for action.
- Recommending and actioning changes for procedures and policies.

Key skills

- Good interpersonal and communication skills.
- Intermediate MS Office skills.
- Strong organisation and time management skills.
- Ability to work in a team environment.

Internal contacts

Staff at all Levels.

External contacts

Customers, Clients and Suppliers.

Typical experience

At least 2 - 4 years applicable experience in a specific functional area. High school qualifications or equivalent with course work in business curriculum.

Other comments

Alternative Titles: Clerk - Level 3, Senior Operations Representative, Operations Support Consultant, Senior Transaction Services Officer.

Position Description

Position title: Processing & Transaction Support Officer
Position code: Aon.OPS.TS301.1
Level: 1

Responsible for

Providing transactional support for the organisation and internal Departments/Teams.

Report to

Team Leaders/ Managers

Supervises

No supervisory responsibilities.

Main activities

- Handling segments of a Branch or Department's transactional work without supervision.
- Maintaining all processing as required.
- Drafting of correspondence as required.
- Collating reports within area of assigned activity.
- Resolving discrepancies and handling exceptions, recognising problem areas as they arise.

Key skills

- Good interpersonal and communication skills.
- Intermediate MS Office skills.
- Effective organisation and time management skills.
- Efficient and accurate typing ability.
- Ability to work in a team environment.

Internal contacts

Staff at all Levels.

External contacts

Customers, Clients and Suppliers.

Typical experience

At least 12-18 months applicable work experience. High school qualifications or equivalent with course work in business curriculum.

Other comments

Alternative Titles: Clerk - Level 2, Operations Representative, Transaction Services Officer.

Position Description

Position title: Manager - Sales Support Operations
Position code: Aon.SLS.SS401.5
Level: 5

Responsible for

Directing the sales support department to drive internal sales responses and develop processes and procedures to ensure the effective and efficient delivery of administrative support to the sales team.

Report to

General Manager in Retail, Business, Corporate Banking

Supervises

Sales Support/Internal Sales Team Leaders and Staff

Main activities

- Planning and directing the activities of a team of Sales Support/Internal Sales staff, ensuring all staff provide optimal administrative support to allow the Sales Team to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and direction, aligning Sales Administration activities with the broader business plan.
- Regularly reporting on inbound enquiries, support and sales transactions to effectively monitor the efficiency of processes from receipt of order to dispatch and payment
- Training team leaders and staff on providing support for the production of tenders, bids and other Sales related documents
- Receiving and handling customer complaints escalated by team leaders.
- Recruiting, selecting and training Sales Support/ Internal Sales staff.

Key skills

- Management, leadership, mentoring, business, accounting and reporting skills.
- Proven sales and operational support ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Analytical interpretation and advanced problem solving abilities.
- Skills in conflict resolution

Internal contacts

Senior Sales Management, Sales Support Staff, Marketing Staff, Customer and Technical Support, Research and Development Staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

7+ years of experience, may possess relevant tertiary qualifications.

Other comments

Alternative Titles: Sales Administration Manager

Position Description

Position title: Team Leader - Sales Support Operations
Position code: Aon.SLS.SS401.4
Level: 4

Responsible for

Managing diverse processes and ensuring adequate staffing for Sales Support Team.

Report to

Manager - Sales Support Operations or other Business Manager (such as Branch Manager or Manager Agribusiness).

Supervises

A team of Sales Support staff.

Main activities

- Ensuring all appropriate responses to customer requests are provided within specified time-frames and service levels.
- Monitoring service levels for account process functions, report completion and resolution of customer complaints
- Maximising staff performance levels and job satisfaction to achieve and maintain agreed target levels for turnover and morale.
- Planning and implementing change initiatives and monitoring results to maximise benefits.
- Ensuring that policies and procedures comply with company policy and legislation, including rectification of deficiencies and resolution of any issue(s).
- Developing and implementing process improvements to achieve customer service level enhancements.

Key skills

- High conceptual/analytical ability, coaching skills, ability to plan and organise.

Internal contacts

Branch Managerial/Supervisory staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

4-5+ years experience in customer service/banking.

Other comments

Position Description

Position title: Sales Support Officer
Position code: Aon.SLS.SS401.3
Level: 3

Responsible for

Providing administrative support for the organisation and internal Sales Departments/Teams as required.

Report to

Team Leaders/Managers, Sales Support/Sales Managers

Supervises

No supervisory responsibilities.

Main activities

- Handling complete segments of a Sales Team's administrative work without supervision.
- Maintaining documentation and processing.
- Drafting of correspondence as required.
- Collating reports and statistical information within area of assigned activity.
- Resolving discrepancies and handling difficult exceptions, recognising problem areas as they arise and making recommendations to group leader for action.
- Recommending and actioning changes for procedures and policies.

Key skills

- Good interpersonal and communication skills.
- Intermediate MS Office skills.
- Strong organisation and time management skills.
- Ability to work in a team environment.

Internal contacts

Sales Teams, Marketing Staff, Finance & Administration Staff

External contacts

Customers and Clients, Suppliers.

Typical experience

At least 2 - 4 years applicable experience in a specific functional area. High school qualifications or equivalent with course work in business curriculum.

Other comments

Alternative Titles: Clerk - Level 3, Sales Support Specialist.

Position Description

Position title: Sales Support Administrator
Position code: Aon.SLS.SS401.2
Level: 2

Responsible for

Receiving inbound Sales orders, providing product information, advice and support to customers, and maintaining effective internal Sales and administrative procedures for the recording of all Sales transactions from receipt of order to dispatch and payment.

Report to

Team Leaders/Managers, Sales Support/Sales Managers

Supervises

No supervisory responsibilities.

Main activities

- Handling segments of a Sales Team's administrative work without supervision.
- Maintaining documentation and processing.
- Drafting of correspondence as required.
- Collating reports within area of assigned activity.
- Resolving discrepancies and handling difficult exceptions.

Key skills

- Good organisational and administrative skills.
- Attention to detail.
- Excellent communication skills and a growing Sales focus.
- Sound product/service knowledge.

Internal contacts

Sales Teams, Marketing Staff, Finance & Administration Staff

External contacts

Customers and Clients, Suppliers.

Typical experience

Typically 12-18+ months of experience.

Other comments

Alternative Titles: Sales Administration Assistant

Position Description

Position title: Branch Manager (large branch >12)
Position code: Aon.RET.BR108.5
Level: 5

Responsible for

Managing the activities of a large branch (> 12 staff) to achieve branch profit and other targets (objectives).

Report to

Regional Manager

Supervises

Retail Banking staff

Main activities

- Ensuring emphasis on efficient customer service at all time resulting in prompt, courteous and efficient processing of all transactions.
- Ensuring the quality of lending, credit management and control of bad debts within the Branch is maintained to required standards.
- Approving loans within authority/discretionary limits and referring larger amounts through relevant channels for approval.
- Maintaining and developing the personal skills of all staff in the branch to maximise target achievement. This role will include recruitment, training and development, reward and performance assessment.
- Being accountable for the maintenance of the organisation's policies and procedures within prescribed limits of approval for the branch.
- Submitting all required reports concerning branch operations promptly and accurately.
- Ensuring all branch and customer records and assets are safeguarded. Continually monitoring and improving office processing, procedures and documentation.
- Actively promoting the organisation's product range and developing the business activities of the branch through continual customer contact.

Key skills

- Effective management skills.
- Excellent knowledge of Branch operations.
- Excellent communication skills.

Internal contacts

Head Office Support staff.

External contacts

Major customers, developers, insurers, Government and local authority departments, other financial institutions.

Typical experience

At least 7 years experience in all branch operations. Experience in some specialised products within a large banking environment.

Other comments

Alternative Title: Store Manager (large store)

Position Description

Position title: Branch Manager (medium branch 6-12)
Position code: Aon.RET.BR104.5
Level: 5

Responsible for

Managing the activities of an medium branch (6-12 staff) to achieve branch profit and other targets (objectives).

Report to

Regional Manager

Supervises

Retail Banking staff

Main activities

- Ensuring emphasis on efficient customer service at all time resulting in prompt, courteous and efficient processing of all transactions.
- Ensuring the quality of lending, credit management and control of bad debts within the Branch is maintained to required standards.
- Approving loans within authority/discretionary limits and referring larger amounts through relevant channels for approval.
- Maintaining and developing the personal skills of all staff in the branch to maximise target achievement. This role will include recruitment, training and development, reward and performance assessment.
- Being accountable for the maintenance of the organisation's policies and procedures within prescribed limits of approval for the branch.
- Submitting all required reports concerning branch operations promptly and accurately.
- Ensuring all branch and customer records and assets are safeguarded. Continually monitoring and improving office processing, procedures and documentation.
- Actively promoting the organisation's product range and developing the business activities of the branch through continual customer contact.

Key skills

- Effective management skills.
- Excellent knowledge of Branch operations.
- Excellent communication skills.

Internal contacts

Head Office Support staff.

External contacts

Major customers, developers, insurers, Government and local authority departments, other financial institutions.

Typical experience

5-7+ years experience in all branch operations.

Other comments

Alternative Title: Store Manager (small store)

Position Description

Position title: Branch Manager (small branch <6)
Position code: Aon.RET.BR101.5
Level: 5

Responsible for

Managing the activities of an small branch (<6 staff) to achieve branch profit and other targets (objectives).

Report to

Regional Manager

Supervises

Retail Banking staff

Main activities

- Ensuring emphasis on efficient customer service at all time resulting in prompt, courteous and efficient processing of all transactions.
- Ensuring the quality of lending, credit management and control of bad debts within the Branch is maintained to required standards.
- Approving loans within authority/discretionary limits and referring larger amounts through relevant channels for approval.
- Maintaining and developing the personal skills of all staff in the branch to maximise target achievement. This role will include recruitment, training and development, reward and performance assessment.
- Being accountable for the maintenance of the organisation's policies and procedures within prescribed limits of approval for the branch.
- Submitting all required reports concerning branch operations promptly and accurately.
- Ensuring all branch and customer records and assets are safeguarded. Continually monitoring and improving office processing, procedures and documentation.
- Actively promoting the organisation's product range and developing the business activities of the branch through continual customer contact.

Key skills

- Effective management skills.
- Excellent knowledge of Branch operations.
- Excellent communication skills.

Internal contacts

Head Office Support staff.

External contacts

Major customers, developers, insurers, Government and local authority departments, other financial institutions.

Typical experience

5-7+ years experience in all branch operations.

Other comments

Alternative Title: Store Manager (small store)

Position Description

Position title: Senior Personal Banker
Position code: Aon.RET.BR101.4
Level: 4

Responsible for

Acting as a advisor to sell complex products (such as home loans or higher levels of credit) to best suit the customer needs. Identifying potential customer leads.

Report to

Branch Manager

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Providing customers with a tailored service around an organisation's complex product offering.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer's needs.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Actively building relationships around the business that support branch initiatives.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Customer service focus.
- In-depth complex Product knowledge/Technical knowledge of banking systems.
- Communication and interpersonal skills.

Internal contacts

Head Office Support staff.

External contacts

Customers.

Typical experience

At least 4-5 years of experience in all aspects of branch transactions as well as the ability to present and promote the organisation's complex product line.

AFA Qualified.

Other comments

Alternative Titles: Personal Manager, Senior Banking Advisor, Relationship Manager

Position Description

Position title: Team Leader - Retail Banking
Position code: Aon.RET.BR105.4
Level: 4

Responsible for

Supervising a team of staff in a branch environment and the daily routine financial transactions.

Report to

Branch Manager

Supervises

Customer service consultants

Main activities

- Supervising staff to ensure the correct maintenance of branch procedures particularly in relation to reconciling cash on hand with the various daily financial transactions.
- Providing workplace training for staff, monitoring performance and providing counsel and guidance in difficult situations.
- Handling more difficult customer queries.
- Normal counter duties as part of the responsibility.
- May also share the keeping of keys and to be responsible for security procedures.
- Responsible for all cash held on branch premises.
- Daily balancing and banking of cash.

Key skills

- Strong interpersonal and communication skills.
- Supervisory skills.

Internal contacts

Counter staff, Support staff.

External contacts

Customers.

Typical experience

At least 4 - 5 years experience in a Branch environment.

May be AFA Qualified.

Other comments

Position Description

Position title: Personal Banker
Position code: Aon.RET.BR101.3
Level: 3

Responsible for

Acting as a advisor to sell products (such as personal loans and credit card lending) to best suit the customer needs.
Identifying potential customer leads.

Report to

Branch Manager

Supervises

No supervisory responsibilities.

Main activities

- Providing customers with a tailored service around an organisation's complex product offering.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer's needs.
- Maintaining a high standard of customer service and personal presentation.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Actively build relationships around the business that support branch initiatives.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Customer service focus.
- In-depth complex Product knowledge/Technical knowledge of banking systems.
- Communication and interpersonal skills.

Internal contacts

Head Office Support staff.

External contacts

Customers.

Typical experience

At least 2-3 years of experience in all aspects of branch transactions as well as the ability to present and promote the organisation's product line.

AFA Qualified.

Other comments

Alternative Title: Banking Advisor

Position Description

Position title: Senior Customer Service Consultant
Position code: Aon.RET.BR105.2
Level: 2

Responsible for

Providing in branch customer service across a range of queries

Report to

Branch Manager or Team Leader - Retail Banking

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Providing an efficient service to customers by prompt and accurate processing of transactions.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer's needs.
- Maintaining a high standard of customer service and personal presentation.
- Building long term relationships with customers by meeting customer needs, resolving concerns or issues.
- Referring customers with more detailed enquires (e.g. home or personal loans).
- Ensuring cash holding is balanced daily.
- Administering all aspects of branch ATMs e.g. ordering cash, loading and balancing.
- Ensuring that all relevant procedures and guidelines are adhered to.
- Performing general administrative duties within the branch on a routine and as required basis. E.g. monitoring coin reverse, filing daily vouchers, foreign cash/travellers cheque transactions.

Key skills

- Customer service focus.
- Product knowledge/Technical knowledge of banking systems.
- Communication and interpersonal skills.

Internal contacts

Head office support staff.

External contacts

Customers.

Typical experience

At least 2 years of experience in all aspects of branch transactions as well as the ability to present and promote the organisation's product line.

Other comments

Alternative Titles: Senior Customer Service Representative, Senior Customer Service Officer

Position Description

Position title: Customer Service Consultant
Position code: Aon.RET.BR101.2
Level: 2

Responsible for

Providing in branch customer service across a range of queries

Report to

Branch Manager or Team Leader - Retail Banking

Supervises

No supervisory responsibilities.

Main activities

- Providing an efficient service to customers by prompt and accurate processing of transactions.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer's needs.
- Maintaining a high standard of customer service and personal presentation.
- Building long term relationships with customers by meeting customer needs, resolving concerns or issues.
- Referring customers with more detailed enquires (e.g. home or personal loans).
- Ensuring cash holding is balanced daily.
- Administering all aspects of branch ATMs e.g. ordering cash, loading and balancing.
- Ensuring that all relevant procedures and guidelines are adhered to.
- Performing general administrative duties within the branch on a routine and as required basis. E.g. monitoring coin reverse, filing daily vouchers, foreign cash/travellers cheque transactions.

Key skills

- Customer service focus.
- Product knowledge/Technical knowledge of banking systems.
- Communication and interpersonal skills.

Internal contacts

Head office support staff.

External contacts

Customers.

Typical experience

At least 1 year of experience in all aspects of branch transactions as well as the ability to present and promote the organisation's product line.

Other comments

Alternative Titles: Customer Service Representative, Customer Service Officer

Position Description

Position title: Manager - Broker Relationship Management
Position code: Aon.RET.RM401.5
Level: 5

Responsible for

Executing the Broker Relationship strategy to achieve sales objectives and profit targets for the organisation.

Report to

National Manager or General Manager

Supervises

Mortgage Broker Relationship Team.

Main activities

- Managing the Broker stream of business to achieve short and long term business objectives, increased profit and market control.
- Managing a team of Broker relationship account managers who provide excellent level of service to encourage strong retention and growth in this channel.
- Leading the provision of information and training to Brokers on the organisation's products, product features, facilities and service standards as often as required.
- Appraising the activities of staff according to overall Broker strategies. Monitoring and evaluating the performance and the efficiency of staff and procedures in related areas.
- Developing strategic plans to achieve new business targets and liaising with marketing and sales staff, industry associations, government bodies and others, to ensure new business opportunities are identified and followed through.
- Identifying, evaluating and recommending new Broker business opportunities to extend and develop the organisation's customer and profit base.
- Regularly evaluating NPS across the Broker channel to gauge sentiment and to improve this across the board.

Key skills

- Excellent negotiation skills.
- Excellent communication skills.
- Strong Sales Management/Leadership skills.
- High customer focus.

Internal contacts

Lending Services, Compliance Department, Marketing Department, Sales Department.

External contacts

Third Parties (i.e. Brokers), Lenders, Vendors, Industry Associations, Other Referral Points.

Typical experience

At least 7 years experience within the finance industry in areas such as sales, mortgage lending, commercial lending, compliance and regulatory affairs, coupled with relevant tertiary qualifications.

Other comments

Alternative titles: Broker Services Manager.

Position Description

Position title: Senior Account Manager
Position code: Aon.RET.RM401.4
Level: 4

Responsible for

Generating and managing Third Party relationships with brokers to achieve sales objectives and profit targets for the organisation.

Report to

Manager - Broker Relationship Management

Supervises

No supervisory responsibilities.

Main activities

- Managing Broker relationships for the achievement of short and long term business objectives, increased profit and market control.
- Monitoring market trends in the region and gathering information of changes in competition, product availability or related matters.
- Providing information and training to Brokers on the organisation's products, product features, facilities and service standards as often as required. Initiating and maintaining regular call and visitation programmes for new and existing referrer groups.
- Developing strategic plans to achieve new business targets and liaising with marketing and sales staff, industry associations, government bodies and others, to ensure new business opportunities are identified and followed through.
- Identifying, evaluating and recommending new Broker business opportunities to extend and develop the organisation's customer and profit base.
- Preparing and conducting presentations to and negotiations with prospective Brokers and customers to achieve organisational growth objectives.
- Preparing regular reports and analyses of new business achievements, opportunities and targets.
- Acting as an intermediary for the Lending Department to maintain high levels of customer service and identify adverse trends in both credit policy and/or documentation.
- Regular review of performance of referrer organisations and to ensure adherence to desired performance levels.

Key skills

- Excellent negotiation skills.
- Excellent communication skills.
- Strong Sales Management/Leadership skills.
- High customer focus.

Internal contacts

Lending Services, Compliance Department, Marketing Department, Sales Department.

External contacts

Third Parties (i.e. Brokers), Lenders, Vendors, Industry Associations, Other Referral Points.

Typical experience

At least 4-5 years experience within the finance industry in areas such as sales, mortgage lending, commercial lending, compliance and regulatory affairs, coupled with relevant tertiary qualifications.

Other comments

Alternative titles: Senior Broker Relationship Advisor, Broker Centre Manager

Position Description

Position title: Account Manager - Lending - Broker Relationship Management
Position code: Aon.RET.RM401.3
Level: 3

Responsible for

Managing and retaining Third Party relationships with brokers to achieve sales objectives and profit targets for the organisation.

Report to

Manager - Broker Relationship Management

Supervises

No supervisory responsibilities.

Main activities

- Managing Broker relationships for the achievement of short and long term business objectives, increased profit and market control.
- Providing information and training to Brokers on the organisation's products, product features, facilities and service standards as often as required. Initiating and maintaining regular call and visitation programmes for new and existing referrer groups.
- Preparing presentations to and negotiations with prospective Brokers and customers to achieve organisational growth objectives.
- Preparing regular reports and analyses of new business achievements, opportunities and targets.
- Acting as an intermediary for the Lending Department to maintain high levels of customer service and identify adverse trends in both credit policy and/or documentation.
- Regular review of performance of referrer organisations and to ensure adherence to desired performance levels.

Key skills

- Excellent negotiation skills.
- Excellent communication skills.
- Strong Sales skills.
- High customer focus.

Internal contacts

Lending Services, Compliance Department, Marketing Department, Sales Department.

External contacts

Third Parties (i.e. Brokers), Lenders, Vendors, Industry Associations, Other Referral Points.

Typical experience

At least 2-3 years experience within the finance industry in areas such as sales, mortgage lending, commercial lending, compliance and regulatory affairs, coupled with relevant tertiary qualifications.

Other comments

Alternative titles: Broker Relationship Advisor, Personal Banker Specialist

Position Description

Position title: Manager - Mortgage Broking
Position code: Aon.RET.LB301.5
Level: 5

Responsible for

Ensuring cost effective business growth through superior distribution, quality service and the effective management of Brokerage Teams, servicing clients within a geographic area. Products and services include home loans and lines of credit.

Report to

Brokerage Owner or General Manager

Supervises

Brokerage Team

Main activities

- Managing Broking Team to achieve business growth and performance targets to assist in the attainment of company sales plans.
- Identifying opportunities and developing strategies to optimise income and effectively manage costs.
- Liaising with financial services institutions to obtain required product/credit streams.
- Conducting team meetings to disseminate results, analyse effectiveness of sales efforts, assist staff in developing sales strategies and identify product or skills training needs.
- Providing for and actively managing staff development and succession planning.
- Monitoring lending proposals to ensure legal and regulatory compliance.
- Monitoring the quality of the lending submissions and ensuring the timely identification and reporting of potentially risky loans.
- Monitoring the team's adherence to customer service standards which includes monitoring and actioning customer complaints.
- Monitoring and coaching staff to ensure compliance with company policies and procedures, laws and codes of practice.

Key skills

- Knowledge of local markets combined with an understanding of local product requirements.
- Ability to develop good relationships with financial institutions.
- Broad knowledge of lending products (including business lending products), policies and procedures.

Internal contacts

Brokers and Senior Brokers. Administration Team.

External contacts

Customers, financial institutions

Typical experience

At least 7+ years relevant industry experience including sales leadership. AFA qualification.

Other comments

Position Description

Position title: Senior Mortgage Broker
Position code: Aon.RET.LB301.4
Level: 4

Responsible for

The sale of financial products to new and existing customers by visiting them at their home, office or service outlet.

Report to

Brokerage Manager

Supervises

No supervisory responsibilities.

Main activities

- Selling a range of financial products and services to both new and existing clients.
- Forwarding applications and information to relevant financial institutions for processing.
- Building and maintaining a network of referral sources.
- Ensuring compliance with relevant policies and procedures, laws and codes of practice.

Key skills

- Well developed sales skills, supported by excellent product and services knowledge.
- Excellent communication skills.
- Self motivated as well as being highly organised.

Internal contacts

Senior Brokers and Brokers.
Administration Team.

External contacts

Customers, financial institutions

Typical experience

At least 4-5 years sales experience in a financial services environment. AFA qualification.

Other comments

Position Description

Position title: Mortgage Broker
Position code: Aon.RET.LB301.3
Level: 3

Responsible for

Selling financial products to new and existing customers by visiting them at their home, office or service outlet.

Report to

Brokerage Manager

Supervises

No supervisory responsibilities.

Main activities

- Selling a range of financial products and services to both new and existing clients.
- Forwarding applications and information to relevant financial institutions for processing.
- Building and maintaining a network of referral sources.
- Ensuring compliance with relevant policies and procedures, laws and codes of practice.

Key skills

- Well developed sales skills, supported by excellent product and services knowledge.
- Excellent communication skills.
- Self motivated as well as being highly organised.

Internal contacts

Senior Brokers and Brokers.

Administration Team.

External contacts

Customers, financial institutions

Typical experience

3-5+ years sales experience in a financial services environment. AFA qualification.

Other comments

Position Description

Position title: National Manager
Position code: Aon.RET.RF101.7
Level: 7

Responsible for

Overall planning, direction and control of all sales in the retail branch organisation

Report to

General Manager/Head of Retail Banking

Supervises

Regional Managers

Main activities

- Providing input to senior management on sales strategy, policies and objectives for the retail Branch network.
- Setting detailed sales targets for Divisions and Branches to fulfil their organisational targets.
- Managing branch and key account sales forces, ensuring all HR and procedural policies and systems are adhered to.
- Identifying and managing liaison with third party sales channels (agents, brokers, dealers).
- Monitoring and reporting on the achievement of predetermined sales targets.
- Identifying areas for business and product development, forecasting future sales targets, implementing plans with Product Developing and Marketing specialists.

Key skills

- Sound management ability.
- Proven track record in achieving business targets.
- Strong people management skills.
- Good communication and interpersonal skills.

Internal contacts

Regional Managers, Branch Managers, Sales and Marketing Staff, Customer Service and Product Development staff, Accounts and Administration staff.

External contacts

Customers, industry groups, property developers, insurers, Government departments, other financial institutions.

Typical experience

Requires 12 to 15+ years extensive experience in all operating aspects. Staff management experience is essential. A professional qualification e.g. C.P.A. may apply.

Other comments

Alternative Titles: Head of Retail Sales, National Retail Sales Manager, Sales Director

Position Description

Position title: Regional Manager - Retail Banking
Position code: Aon.RET.RF101.6
Level: 6

Responsible for

Managing the branch network within a region profitably and in accordance with the organisation's policy and procedure outline.

Report to

National Manager

Supervises

Branch Managers

Main activities

- Coordinating the activities of retail branches to achieve profit, administrative, sales and marketing plans/targets for the Region.
- Preparing targets and objectives for the Region and providing regular reporting feedback to Head Office as to actual progress to targets (budgets) outlining reasons for variances.
- Approving larger loans in the Region within discretionary limits.
- Controlling the quality of all services offered in the region by effective direction of staff, monitoring the maintenance of correct procedures and taking corrective action.
- Maintaining and developing the team's skills within the region which includes the coordination of recruitment, training and development, performance assessment and reward.
- Being accountable for the maintenance of the organisation's policies and procedures within the region, within prescribed limits of approval especially with regard to lending.
- Interacting regularly with other operating and service divisions.

Key skills

- Sound management ability.
- Proven track record in achieving business targets.
- Good communication and interpersonal skills.
- Strong people management skills.

Internal contacts

Other Regional Managers, Branch Managers, Sales and Marketing Staff, Customer Service and Product Development staff, Accounts and Administration staff.

External contacts

Customers, industry groups, property developers, insurers, Government departments, other financial institutions.

Typical experience

Requires 10 to 15+ years extensive experience in all operating aspects. Staff management experience is essential. A professional qualification e.g. C.P.A. may apply.

Other comments

Position Description

Position title: Manager - Mobile Lending
Position code: Aon.RET.MM201.5
Level: 5

Responsible for

Ensuring cost effective business growth through superior distribution, quality service and the effective management of Mobile Lending Sales Teams, servicing clients within a geographic area. Products and services include home loans and lines of credit.

Report to

Regional Manager

Supervises

Mobile Lending team

Main activities

- Achieving business growth and performance targets to assist in the attainment of regional sales plans.
- Identifying opportunities and developing strategies to optimise income and effective manage costs.
- Conducting team meetings to disseminate results, analyse effectiveness of sales efforts, assist staff in developing sales strategies and identify product or skills training needs.
- Providing for and actively managing staff development and succession planning.
- Approving lending proposals within delegation parameters.
- Controlling and monitoring the quality of the lending portfolio and ensuring the timely identification and management of potentially risky loans.
- Performing lending analysis and control including actioning pricing issues.
- Monitoring the team's adherence to customer service standards which includes monitoring and actioning customer complaints.
- Monitoring and coaching staff to ensure compliance with relevant policies and procedures, laws and codes of practice.

Key skills

- Knowledge of local markets combined with an understanding of local product requirements.
- Ability to mentor and coach Sales Representatives and Lending Specialists.
- Broad knowledge of lending products (including business lending products), policies and procedures.

Internal contacts

Area Manager Sales, Mobile Lenders, Lenders and Lending Support Staff.

External contacts

Solicitors, Accountants, Receivers, Valuation Specialists, Customers.

Typical experience

At least 7+ years relevant industry experience including sales leadership. AFA qualification.

Other comments

Position Description

Position title: Senior Mobile Lender
Position code: Aon.RET.MM201.4
Level: 4

Responsible for

The sale of financial products to new and existing customers by visiting them at their home, office or service outlet.

Report to

Regional Manager or Manager - Mobile Lending

Supervises

No Supervisory Responsibilities.

Main activities

- Selling a range of financial products and services to both new and existing clients.
- Forwarding applications and information to the Sales Support Centre for processing.
- Handing over newly acquired clients to the appropriate client services.
- Building and maintaining a network of referral sources.
- Ensuring compliance with relevant policies and procedures, laws and codes of practice.

Key skills

- Well developed sales skills, supported by excellent product and services knowledge.
- Excellent communication skills.
- Self motivated as well as being highly organised.

Internal contacts

Sales Administration Team, Sales Advisers.

External contacts

Customers.

Typical experience

At least 4-5 years sales experience in a financial services environment. AFA qualification.

Other comments

Position Description

Position title: Mobile Lender
Position code: Aon.RET.MM201.3
Level: 3

Responsible for

Selling financial products to new and existing customers by visiting them at their home, office or service outlet.

Report to

Regional Manager or Manager - Mobile Lending.

Supervises

No supervisory responsibilities.

Main activities

- Selling a range of financial products and services to both new and existing clients.
- Forwarding applications and information to the Sales Support Centre for processing.
- Handing over newly acquired clients to the appropriate client services.
- Building and maintaining a network of referral sources.
- Ensuring compliance with relevant policies and procedures, laws and codes of practice.

Key skills

- Well developed sales skills, supported by excellent product and services knowledge.
- Excellent communication skills.
- Self motivated as well as being highly organised.

Internal contacts

Sales Administration Team, Sales Advisers.

External contacts

Customers.

Typical experience

3-5+ years sales experience in a financial services environment. AFA qualification.

Other comments

Position Description

Position title: Regional Manager - Private Banking
Position code: Aon.RET.PB601.5
Level: 5

Responsible for

Overseeing the team to provide a comprehensive range of personal banking services to high net worth clients

Report to

General Manager/Head of Retail Banking

Supervises

Private Banking Team

Main activities

- Providing input to senior management on sales strategy, policies and objectives as well as sales and business development targets for the Private Banking network.
- Developing and managing the network of Managers and Advisors by identifying, recruiting and training staff, and managing their performance.
- Developing business and product plans, setting sales and business development targets, monitoring and reporting on performance to senior management.
- Ensuring accurate reporting systems for management information.
- Ensuring up-to-date systems, marketing, product and technical training for Financial Advisors, including risk management and legal/compliance issues, by liaising with appropriate internal support services. Managing and reporting on the performance against targets of the division and individual staff members.

Key skills

- Strong leadership, negotiating, interpersonal and people-management skills.
- Extensive experience in servicing clients in Private Banking environment.
- Demonstrated strategic thinking and business development skills.

Internal contacts

Private banking staff at all levels, Marketing, Technical, Product Development, Investment & Risk Management

External contacts

Individual clients, investment companies, industry associations

Typical experience

At least 7-10+ years of experience in all aspects of branch transactions as well as an extensive knowledge of the organisation's complex product line. Relevant degree and AFA qualification.

Other comments

Alternative Title: Client Director

Position Description

Position title: Senior Client Manager
Position code: Aon.RET.PB601.4
Level: 4

Responsible for

Managing a portfolio of Private Banking clients, providing a comprehensive range of personal banking services, either personally or by directing the work of Team Members.

Report to

Regional Manager - Private Banking

Supervises

May supervise Client Managers and/or Personal Bankers

Main activities

- Providing customers with a tailored service around an organisation's complex product offering by acting personally for high-net-worth clients, or supervising the delivery of services to customers through a team of Client Managers.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer's needs.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Actively build relationships around the business that support the organisation's initiatives.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Excellent knowledge of all products, provides advice & ongoing support of transactions. High level systems & product accounting skills. Knowledge of regulatory & tax requirements. Applies excellent communication & management skill, along with product knowledge. Good knowledge of reporting tools & technologies.

Internal contacts

Investment and Financial Planning staff, Marketing, Technical, Product Development staff

External contacts

Individual clients, investment companies, industry associations

Typical experience

At least 5-7 years of relevant experience in all aspects of branch transactions and wealth/funds management as well as the ability to present and promote the organisation's complex product line. Relevant degree and AFA qualification.

Other comments

Alternative Title: Private Banking Manager

Position Description

Position title: Client Manager
Position code: Aon.RET.PB601.3
Level: 3

Responsible for

Managing personally an assigned portfolio of Private Banking clients, providing a comprehensive range of personal banking services

Report to

Regional Manager - Private Banking

Supervises

May supervise Personal Bankers.

Main activities

- Providing customers with a tailored service for the day-to-day management of their accounts.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer's needs.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Excellent knowledge of all products, provides advice & ongoing support of transactions. High level systems & product accounting skills. Knowledge of regulatory & tax requirements. Applies excellent communication & management skill, along with product knowledge. Good knowledge of reporting tools & technologies.

Internal contacts

Investment and Financial Planning staff, Marketing, Technical, Product Development staff

External contacts

Individual clients, investment companies, industry associations

Typical experience

5+ years experience, including at least 2-3 years experience in wealth & funds management. Degree, AFA qualification.

Other comments

Position Description

Position title: Head of Financial Advice
Position code: Aon.RET.FA501.6
Level: 6

Responsible for

Overseeing Financial Advisory Services across the network.
Achieving the organisation's sales targets for financial advice and guidance to individual clients.

Report to

General Manager/Head of Retail Banking

Supervises

Financial Advice Team

Main activities

- Providing input to senior management on sales strategy, policies and objectives and business development for Financial Advice services embedded within the Branch network.
- Developing and managing the network of financial advisors by liaising with Retail Branch network staff.
- Developing business and product plans, setting sales and business development targets, monitoring and reporting on performance to senior management.
- Ensuring accurate reporting systems for management information, including commission payments and compliance.
- Ensuring up-to-date marketing, product and technical training and support for Financial Advisors, including risk management and legal/compliance issues.

Key skills

- Extensive experience in servicing clients and reviewing investment portfolios.
- Good communication skills, both written and verbal.
- Demonstrated strategic thinking and business development skills.
- Strong negotiating, interpersonal and people-management skills.

Internal contacts

Branch network staff at all levels, Marketing, Technical, Product Development, Investment & Risk Management

External contacts

Individual clients, investment companies, industry associations

Typical experience

Requires 12 to 15+ years extensive experience in all aspects of investment and wealth management. Staff management experience is essential. Tertiary educational qualifications in finance. Professionally qualified Authorised Financial Advisor.

Other comments

Alternative Titles: Head of AFA Sales

Position Description

Position title: Practice Manager - Financial Advice
Position code: Aon.RET.FA501.5
Level: 5

Responsible for

Managing operational support services to provide optimal efficiency and cost effectiveness throughout the financial advisory service function.

Report to

Head of Financial Advice

Supervises

May supervise a support team.

Main activities

- Providing timely management information on the activities and outcomes of the Financial Advisory service within the Branch network.
- Providing assistance to the Head of Financial Advice to ensure timely identification and communication of issues to senior management.
- Optimising the efficiency and effectiveness of the Branch network's Financial Advisory services by developing and implementing training programmes, reporting systems and performance review mechanisms by liaising with internal departments such as Marketing, Product Development, Risk Management and Compliance.
- Ensuring that appropriate legal and statutory reporting requirements are carried out.
- Providing advice and recommendations to management and the Branch network on risk management issues which may affect the organisation (e.g. statutory obligations, ethics, confidentiality, security of people and systems, health and safety, insurance etc.)

Key skills

- Good understanding of Financial Advisory services systems and processes.
- Good communication and interpersonal skills.
- Project management and administrative skills.

Internal contacts

Branch network staff at all levels, Marketing, Technical, Product Development, Investment & Risk Management

External contacts

Suppliers, Government departments, industry associations

Typical experience

8-10+ years experience in sole-charge, senior operations role, preferably in banking industry. May have tertiary qualifications in administration, IT or finance.

Other comments

Alternative Titles: Administration Manager - Financial Advice, Regional Manager, Financial Advice

Position Description

Position title: Senior Financial Advisor
Position code: Aon.RET.FA501.4
Level: 4

Responsible for

Targeting and assisting clients to meet their financial objectives through the delivery of professional Financial Planning advice.

Report to

Head of Financial Advice or Practice Manager

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Introducing and developing new Financial Planning business in line with set targets. Coordinating, conducting and participating in sales promotions, campaigns and displays.
- Presenting investment/financial plans to clients in line with set targets.
- Increasing funds under management in line with set targets.
- Identifying, educating and promoting the Financial Planning concept to clients.
- Establishing and maintaining high compliance standards that satisfy legislative requirements.
- Developing networking relationships in order to enhance performance.
- Maintaining professional self development.

Key skills

- Experienced in servicing clients and reviewing investment portfolios.
- Good communication skills, both written and verbal.
- Demonstrated business development skills.
- Ability to work with minimum supervision.
- Ability to work to tight deadlines in order to achieve business outcomes.
- Experienced in delivering workshops and presentations.

Internal contacts

Financial Advisors, Client Relationship Managers, Para Planners.

External contacts

Clients.

Typical experience

At least 5+ years experience in Financial Planning advisory roles coupled with tertiary qualifications in Business, Finance or related discipline . AFA qualification.

Other comments

Position Description

Position title: Financial Advisor
Position code: Aon.RET.FA501.3
Level: 3

Responsible for

Targeting and assisting clients to meet their financial objectives through the delivery of professional financial planning advice.

Report to

Head of Financial Advice or Practice Manager

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Introducing and developing new financial planning business in line with set targets.
- Reviewing and maintaining existing investment/financial plans for clients in line with set targets.
- Increasing funds under management in line with set targets.
- Identifying, educating and promoting the financial planning concept to clients.
- Establishing and maintaining high compliance standards that satisfy legislative requirements.
- Developing networking relationships in order to enhance performance.
- Maintaining professional self development.

Key skills

- Experienced in servicing clients and reviewing investment portfolios.
- Good communication skills, both written and verbal.
- Demonstrated business development skills.
- Ability to work under minimal supervision.
- Ability to work to tight deadlines in order to achieve business outcomes.
- Experienced in delivering workshops and presentations.

Internal contacts

Para planners.

External contacts

Clients.

Typical experience

At least 2+ years experience in Financial Planning advisory roles. Typically degree qualified in business, finance or related discipline. AFA qualifications.

Other comments

Position Description

Position title: Para Planner - Financial Advice
Position code: Aon.RET.FA501.2
Level: 2

Responsible for

Supporting Financial Planners in providing high quality financial planning services to both existing and new clients.

Report to

Senior Financial Advisor

Supervises

No supervisory responsibilities.

Main activities

- Reviewing and researching performance of investment products within client portfolios.
- Reviewing and researching individual client needs, investment strategies and risk profiles.
- Producing financial plans in line with agreed targets.
- Initiating and assimilating investment product research.
- Establishing and ensuring compliance standards associated with corporate law.
- Ensuring workflow standards such as turnaround response times are met.
- Participating in team tasks and projects as directed by Management.

Key skills

- A sound knowledge of social security, taxation, superannuation and investment products.
- Good communication skills, both written and verbal.
- Well developed numerical and analytical skills. Proficient in spreadsheet programs.
- Knowledge of ASIC, ISC and FPA compliance standards.
- Well developed organisational skills.
- Ability to work in a team environment with minimal supervision.

Internal contacts

Financial Planners.

External contacts

Clients, Fund Managers.

Typical experience

Must have previous experience in Financial Planning support, coupled with tertiary qualifications in business, finance or a related discipline. Completed or may be studying towards a AFA qualification.

Other comments

Position Description

Position title: Head of Financial Crime
Position code: Aon.RSK.FC301.6
Level: 6

Responsible for

Lead the Financial Crime Team to develop strategies and policies to protect the organisation from risk financial crime risk.

Report to

Chief Risk Officer or equivalent

Supervises

Financial Crime Team

Main activities

- Manages the Financial Crime Team to oversee the development and implementation of anti-Money Laundering/Fraud Risk Management framework, charter, policy statements and methodology, ensuring it is aligned with best practice and organisational strategy.
- Evaluating and reporting on operational policies and procedures to achieve the Fraud Risk Management objectives and recommend improvements where necessary.
- Introducing new technology, improved Fraud Risk Management techniques and approaches to assist risk identification, measurement and control.
- Facilitating and coordinating business unit documentation of operational policies and procedures.
- Monitoring the progress of Fraud risk management processes on existing and new projects/activities undertaken by the organisation.
- Serving as a reference point to managers on Fraud Risk Management issues.

Key skills

- Ability to work closely with department managers and senior leaders.
- Excellent communication and interpersonal skills.
- Strong people management skills.

Internal contacts

All departments throughout the organisation, Risk Management Committee.

External contacts

Clients, Consultants, other financial institutions.

Typical experience

At least 10-15 years of legal, compliance or financial crime experience in a financial services environment together with relevant tertiary and post graduate qualifications.

Other comments

Alternative Title: Head of Money Laundering / Fraud

Position Description

Position title: Financial Crime Manager
Position code: Aon.RSK.FC301.5
Level: 5

Responsible for

Maintaining a specialist investigations unit which provides cost effective fraud prevention, detection and investigation services.

Report to

Head of Financial Crime

Supervises

Financial Crime Team

Main activities

- Supervising, supporting and managing team members.
- Investigating suspicious and fraudulent claims.
- Developing a highly skilled investigations team
- Developing anti-fraud strategies and policies and creating a high level of awareness within the organisation.
- Liaising with police, witnesses, solicitors, claimants etc.
- Compiling briefs and statistical reports.
- Managing and controlling activities and workload for the area.

Key skills

- Strong leadership skills.
- Strong communication skills
- Presentation and negotiation skills
- Knowledge of general insurance, claims processes and legal environment.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Management experience. Relevant qualifications and 7+ years experience in investigations.

Other comments

Alternative Title: Manager - Money Laundering / Fraud, Investigations Team Manager

Position Description

Position title: Senior Risk Analyst
Position code: Aon.RSK.FC301.4
Level: 4

Responsible for

Ensuring that losses due to fraud are minimised, through early detection, investigation and interpretation of complex data. Detecting, reducing and preventing Fraud to protect the organisation from revenue loss.

Report to

Fraud Manager

Supervises

Risk/Fraud Analysts

Main activities

- Analysing call traffic and account data to identify high risk and out of pattern usage and investigating anomalies.
- Interpreting data and detecting in a timely manner instances of Fraud in order to reduce losses from such risk.
- Acting to limit losses once a Fraud/risk has been detected.
- Selecting and implementing the appropriate action to combat Fraud/high risk exposure.
- Arranging constant monitoring for high/abnormal usage.
- Managing liaisons with applicable internal departments to successfully conclude Fraud investigations.
- Reporting to management on Fraud levels and improving Fraud prevention and detection.
- Actively reviewing procedure and policy and identifying potential process improvements in relation to Fraud and risk management.

Key skills

- Ability to interpret data and generate solutions.
- Extensive experience and knowledge of billing, service provision and credit management systems.
- Excellent negotiation and communication skills.
- Excellent planning and time management skills.
- Attention to detail.
- Ability to manage a team effectively.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

5+ years experience in fraud investigation coupled with relevant tertiary qualifications.

Other comments

Alternative Title: Senior Quality Analyst, Senior Fraud Analyst

Position Description

Position title: Risk Analyst
Position code: Aon.RSK.FC301.3
Level: 3

Responsible for

Interpreting data, detecting, reducing and preventing Fraud to protect the organisation from revenue loss.

Report to

Fraud Manager

Supervises

No supervisory responsibilities.

Main activities

- Analysing traffic and account data to identify high risk and out of pattern usage and investigating anomalies.
- Interpreting data and detecting in a timely manner instances of Fraud in order to reduce losses from such risk.
- Acting to limit losses once a Fraud/risk has been detected.
- Selecting and implementing the appropriate action to combat Fraud/high risk exposure.
- Managing the affected account including liaison with applicable internal departments to successfully conclude Fraud investigations.
- Providing advice and recommendations in relation to Fraud and risk management process and procedure.
- Actively reviewing procedure and policy and identifying potential process improvements in relation to Fraud and risk management.

Key skills

- Ability to interpret data and generate solutions.
- Extensive experience and knowledge of billing, service provision and credit management systems.
- Excellent negotiation and communication skills.
- Excellent planning and time management skills.
- Attention to detail.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

At least 3 years experience in Fraud investigation coupled with relevant tertiary qualifications.

Other comments

Alternative Title: Quality Analyst, Fraud Analyst

Position Description

Position title: Head of Credit Risk
Position code: Aon.RSK.CR101.6
Level: 6

Responsible for

Responsible for overseeing the development and implementation of robust processes and policy around Credit risk decision making

Report to

Chief Risk Officer

Supervises

Credit Risk team

Main activities

- Developing detailed Credit Risk Management framework for organisational divisions/departments, ensuring it is aligned with best practice and organisational strategy.
- Evaluating and reporting on operational policies and procedures to achieve the Credit Risk Management objectives and recommend improvements where necessary.
- Implementing new technology, improved Credit Risk Management techniques and approaches to assist risk identification, measurement and control.
- Facilitating and coordinating business unit documentation of operational policies and procedures.
- Monitoring the progress and potential impact of Credit risk management processes on existing and new projects/activities undertaken by the organisation.
- Serving as a reference point to managers on Credit Risk Management issues.
- Manages the Credit Risk team.

Key skills

- Ability to work closely with department managers and senior leaders.
- Excellent communication and interpersonal skills.
- Strong people management skills.

Internal contacts

All departments throughout the organisation, Risk Management Committee.

External contacts

Clients, Consultants, other financial institutions.

Typical experience

10+ years understanding credit risk. An audit background is an advantage. Tertiary qualifications or equivalent in Mathematics, Operations Research, Statistics or Business. Staff management experience is essential.

Other comments

Position Description

Position title: Credit Risk Manager
Position code: Aon.RSK.CR101.5
Level: 5

Responsible for

Driving the Credit Risk Management process implementation

Report to

Head of Credit Risk

Supervises

Credit Risk team

Main activities

- Drives risk/reward optimisation.
- Determines and delivers methodologies for key risk measures and controls.
- Negotiations changes/enhancements with model owners and business leaders.
- Validates mathematical theory, quantitative models, data, documentation and model outputs.
- Manages specific modelling frameworks to ensure alignment of business decisions with risk appetite of the Organisation.
- Participates in industry forums to assess and drive best practice.
-

Key skills

- Sound understanding of credit regulatory/legislative environment
- High attention to detail and organisational/time management skills
- Strong communication skills, both written and verbal. Ability to build effective working relationships with key stakeholders.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 7+ years relevant experience. Staff management experience is essential.

Other comments

Alternative Title: Credit Assessment Manager

Position Description

Position title: Senior Risk Analyst - Lending & Credit Risk
Position code: Aon.RSK.CR101.4
Level: 4

Responsible for

Ongoing monitoring of the credit and decision quality across the business.

Report to

Credit Risk Manager

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Coaches the business in understanding the risk methodology behind the results.
- Develops and applies complex models to assess, evaluate and measure risk.
- Identifies and resolves issues relating to existing models.
- Provides advice and influences decision-makers based on identified trends and implications to business performance.
- Provides advice to the business on how to manage risk effectively.
- Works with business leaders to establish enterprise-wide research methodologies.
- Keeps in touch with industry practice.

Key skills

- Good analytic skills and proven ability to identify trends, read and interpret data and communicate findings to stakeholders.
- Sound understanding of credit regulatory/legislative environment
- High attention to detail and organisational/time management skills
- Strong communication skills, both written and verbal. Ability to build effective working relationships with key stakeholders.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 5+ years relevant experience.

Other comments

Alternative Title: Senior Credit Quality Analyst, Credit Partner

Position Description

Position title: Risk Analyst - Lending & Credit Risk
Position code: Aon.RSK.CR101.3
Level: 3

Responsible for

Ongoing monitoring of the credit and decision quality across the business.

Report to

Credit Risk Manager

Supervises

No supervisory responsibilities.

Main activities

- Applies mathematical models to the assessment of risks.
- Makes sound recommendations for improvements to existing or new models based on analysis and findings.
- Prepares discussion papers and documents based on investigations & analysis.
- Applies knowledge of business and regulatory drivers when developing models and analysing findings.

Key skills

- Good analytic skills and proven ability to identify trends, read and interpret data and communicate findings to stakeholders.
- High attention to detail and organisational/time management skills

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 3-5+ years relevant experience.

Other comments

Alternative Title: Credit Quality Analyst, Credit Assessment Specialist

Position Description

Position title: Head of Market Risk
Position code: Aon.RSK.MR401.6
Level: 6

Responsible for

Leading the Market Risk Team to minimise the impact of external market risks for the organisation. Oversee the development of strategy, policies and measurement of market risk in order to protect the organisation from that risk.

Report to

Chief Risk Officer or equivalent

Supervises

Market Risk Team

Main activities

- Leads the Market Risk team.
- Developing and implementing the Market Risk Management strategy and framework, ensuring it is aligned with best practice and organisational strategy.
- Evaluating and reporting on target areas to achieve the Market Risk Management objectives and recommend improvements where necessary.
- Drive the introduction of new technology, improved Market Risk Management techniques and approaches to assist risk identification, measurement and control, including foreign exchange exposure.
- Serving as a reference point to managers on Market Risk Management issues.

Key skills

- Ability to work closely with department managers and senior leaders.
- Excellent communication and interpersonal skills.
- Strong people management skills.

Internal contacts

All departments throughout the organisation, Risk Management Committee.

External contacts

Clients, Consultants, other financial institutions.

Typical experience

At least 10-15 years of legal, compliance or applicable risk experience in a financial services environment together with relevant tertiary and post graduate qualifications.

Other comments

Alternative Title:

Position Description

Position title: Market Risk Manager
Position code: Aon.RSK.MR401.5
Level: 5

Responsible for

Monitoring, managing, and proactive preparation to minimise the impact of market risks for the organisation through the provision of advice, support and establishing standards and specifications for all company products/services that are affected by external market forces.

Report to

Head of Market Risk

Supervises

Market Risk Team

Main activities

- Manages the Market Risk Team and coaches the business in understanding the risk methodology behind the results.
- Provides advice to the business on how to manage risk effectively.
- Develops and applies complex models to assess, evaluate and measure risk.
- Provides advice and influences decision-makers based on identified trends and implications to business performance.
- Works with business leaders to establish enterprise-wide research methodologies.
- Keeps in touch with industry practice.

Key skills

- Sound understanding of credit regulatory/legislative environment
- High attention to detail and organisational/time management skills
- Strong communication skills, both written and verbal. Ability to build effective working relationships with key stakeholders.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 7+ years relevant experience. Staff management experience is essential.

Other comments

Position Description

Position title: Senior Risk Analyst - Market Risk
Position code: Aon.RSK.MR401.4
Level: 4

Responsible for

Providing specialist technical advice in the development and ongoing maintenance of the Market Risk Program.

Report to

Manager, Market Risk

Supervises

May supervise Risk Analysts

Main activities

- Coaches the business in understanding the risk methodology behind the results.
- Develops and applies complex models to assess, evaluate and measure risk.
- Identifies and resolves issues relating to existing models.
- Provides advice on identified trends and implications to business performance.
- Provides advice to the business on how to manage risk effectively.
- Works with business leaders to establish enterprise-wide research methodologies.
- Keeps in touch with industry practice.

Key skills

- Good analytic skills and proven ability to identify trends, read and interpret data and communicate findings to stakeholders.
- Sound understanding of credit regulatory/legislative environment
- High attention to detail and organisational/time management skills
- Strong communication skills, both written and verbal. Ability to build effective working relationships with key stakeholders.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 5+ years relevant experience.

Other comments

Alternative Title: Senior Market Risk Specialist

Position Description

Position title: Risk Analyst - Market Risk
Position code: Aon.RSK.MR401.3
Level: 3

Responsible for

Providing technical advice and insights for the Market Risk Program.

Report to

Manager, Market Risk

Supervises

No supervisory responsibilities

Main activities

- Applies mathematical models to the assessment of risks.
- Makes sound recommendations for improvements to existing or new models based on analysis and findings.
- Prepares discussion papers and documents based on investigations & analysis.
- Applies knowledge of business and regulatory drivers when developing models and analysing findings.

Key skills

- Good analytic skills and proven ability to identify trends, read and interpret data and communicate findings to stakeholders.
- High attention to detail and organisational/time management skills

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with at least 3 years relevant experience.

Other comments

Alternative Title: Market Risk Specialist, Market Risk Analyst

Position Description

Position title: Head of Operational Risk and Compliance
Position code: Aon.RSK.OR201.6
Level: 6

Responsible for

Leading the Team to develop operational risk policies and measure operational risk in order to protect the organisation from risk that is caused by inadequate or failed internal processes, people and systems or from external events.

Report to

Chief Risk Officer or equivalent

Supervises

Operational Risk & Compliance Team

Main activities

- Leading the Operational Risk and Compliance Team.
- . Responsible for the development and implementation of the Operational Risk Management framework, charter, policy statements and methodology, ensuring it is aligned with best practice and organisational strategy.
- Evaluating and reporting on operational policies and procedures to achieve the Operational Risk Management objectives and recommend improvements where necessary.
- Introducing new technology, improved Operational Risk Management techniques and approaches to assist risk identification, measurement and control.
- Monitoring the progress of Operational risk management processes on existing and new projects/activities undertaken by the organisation.
- Serving as a reference point to managers on Operational Risk Management issues.

Key skills

- Ability to work closely with department managers and senior leaders.
- Excellent communication and interpersonal skills.

Internal contacts

All departments throughout the organisation, Risk Management Committee.

External contacts

Clients, Consultants, other financial institutions, regulatory bodies.

Typical experience

At least 10 years of legal or compliance experience in a financial services environment together with relevant tertiary and post graduate qualifications.

Other comments

For Audit & Compliance roles, please match to The Source

Position Description

Position title: Manager - Operational Risk and Compliance
Position code: Aon.RSK.OR201.5
Level: 5

Responsible for

Managing the provision of operational risk and regulatory advice, support and establishing standards and specifications for all company products/services that have to comply.

Report to

Head of Operational Risk & Compliance

Supervises

Operational Risk & Compliance Team

Main activities

- Providing expert Operational Risk and Compliance advice and guidance to the organisation.
- Developing policies, procedures and compliance programs.
- Ensuring relevant compliance and policies for new and current products.
- Recommending changes to product specifications in line with all external and internal requirements.
- Understanding both regulatory requirements and best practice and reporting regularly to management on changes and emerging issues affecting the industry.
- Maintaining effective relationships with both internal and external stakeholders.
- Sourcing relevant information to ensure the group is at the forefront of operational risk and compliance management.

Key skills

- Excellent communication, influential and negotiation skills.
- Ability to interpret relevant regulation legislation.
- Knowledge of political and economic structures of key global economies.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients, Consultants, other financial institutions, regulatory bodies.

Typical experience

At least 7+ years of legal or compliance experience in a financial services environment together with relevant qualifications.

Other comments

For Audit & Compliance roles, please match to The Source

Position Description

Position title: Senior Risk Analyst
Position code: Aon.RSK.OR201.4
Level: 4

Responsible for

Providing specialist technical advice to assigned business functions in the development and ongoing maintenance of their Compliance Programmes.

Report to

Manager, Operational Risk & Compliance

Supervises

May supervise Risk Analysts

Main activities

- Promoting and participating in the development of a high quality Compliance Programmes and the necessary procedures, documentation and training.
- Assisting in the identification, preparation and development of appropriate training materials.
- Identifying risk areas and facilitating means to remove or better manage those areas by providing Compliance advice.

Key skills

- Excellent understanding of organisations Compliance program.
- Good knowledge of regulation and legislation affecting the organisation.
- Good knowledge of organisations policy and procedures.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

5+ years of business experience coupled with Legal or Business tertiary qualification .

Other comments

For Audit & Compliance roles, please match to The Source

Position Description

Position title: Risk Analyst
Position code: Aon.RSK.OR201.3
Level: 3

Responsible for

Providing regulatory advice, support and assistance in establishing standards and specifications for all company products/services that have to comply with Government Regulations.

Report to

Manager, Operational Risk & Compliance

Supervises

No supervisory responsibilities.

Main activities

- Assisting with the establishment and coordination of all relevant legislative, regulatory, contractual and other compliance processes.
- Assisting in the planning and preparation of submissions on product specifications.
- Recommending changes to product specifications and processes in line with statutory and best practice requirements.
- Assisting in the development of regulatory reports for regional and overseas offices where applicable.
- Assisting in the researching and sourcing of information to ensure the group is at the forefront of regulatory management.
- Assisting with the roll-out and maintenance of compliance related software systems to manage compliance obligations.
- Assisting with risk management and risk reporting activities as required.
- Providing support for contract management/administration as required.

Key skills

- Good communication skills.
- Ability to interpret relevant regulatory legislation.
- Knowledge of political and economic structures of key global economies.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

At least 3 years of legal or compliance experience in a commercial environment together with relevant qualifications in law, business, commerce or equivalent. May also have come from a risk management or contract administration background.

Other comments

For Audit & Compliance roles, please match to The Source

Position Description

Position title: Senior Sales Manager
Position code: 11005
Level: 6

Responsible for

Controlling the organisation's Sales activities within an industry sector, line of business (LOB), regional location or market segment to achieve predetermined Sales targets from new and existing clients and ensure complete customer satisfaction when dealing with the organisation.

Report to

Sales Director, General Manager.

Supervises

A team of Sales Account Managers, Sales Representatives and Sales Administration staff.

Main activities

- Planning and directing the activities of a team of Sales Account Managers and Sales Representatives, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and strategic direction for the Industry Sector/LOB/Products/Region/Market and aligning the Industry Sector/LOB/Products/Region/Market with a broader business plan.
- Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Significantly contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Coordinating the gathering of market intelligence and monitoring competitors' Sales strategies and products, campaigns and events to optimise market share.
- Overseeing the recruitment, selection and training of Sales staff.

Key skills

- Proven Sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Strategic management, leadership, mentoring, business, accounting and reporting capabilities.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Executive Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

10+ years of experience, may possess relevant tertiary qualifications.

Other comments

This role performs a mix of Sales oriented and Managerial tasks. Alternative Titles: Senior Regional/Branch Sales Manager; Regional Sales Manager.

Position Description

Position title: Sales Manager
Position code: 11015
Level: 5

Responsible for

Acting as the first line of Management, directing team/s of Sales Representatives and Account Managers to achieve predetermined Sales targets from new and existing clients and ensuring complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Business Unit Sales Manager, Sales Director.

Supervises

A team of Sales Representatives, Account Managers and Sales Administration staff.

Main activities

- Planning and directing the activities of team/s of Sales Representatives, and Account Managers, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and direction, aligning Sales activities with the broader business plan. Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Understanding the client's objectives, buying criteria and decision making processes and forming long term business partnerships in order to leverage revenue from the relationship and promote the organisation as a quality supplier with the aim of achieving "preferred" supplier status.
- Monitoring competitors' Sales and product strategies, campaigns and events to optimise market share.
- Recruiting, selecting and training Sales staff.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, leadership, mentoring, business, accounting and reporting skills.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Senior Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

8-10 years of experience, may possess relevant tertiary qualifications.

Other comments

This role performs a mix of Sales oriented and Managerial tasks.

Position Description

Position title:	Business Development Manager
Position code:	11115
Level:	5

Responsible for

Acting as the first line of Management, directing a team of Business Development Specialists to source relationships with clients and key decision makers to develop business opportunities for a new sector, product, service, solution or client.

Report to

Business Development Director, Sales Director, Sales and Marketing Director, Chief Executive Officer or General Manager in smaller organisations.

Supervises

Business Development Specialists.

Main activities

- Planning and directing the activities of a team of Business Development Specialists and ensuring all staff are motivated to attain predetermined Sales targets.
- Developing a market sector by generating sales leads for a brand new organisational product, service or solution. This may be done when the product, service or solution is still in the pipeline.
- Assessing potential partners, performing competitive research, evaluating proposed deals/partnerships, and analysing and developing business cases for new business targets.
- Developing new products, services or solutions by combining several existing products/services and generating leads to establish a corresponding market sector in order to gain new business for the organisation.
- Combining existing products/services for a specific client thereby creating a new product, service or solution that once sold becomes a standard organisational offering.
- Generating term sheets and new business/financial models, and drafting and negotiating contracts.
- Identifying opportunities for business improvement and strategic new business opportunities.
- Managing multiple strategic initiatives simultaneously, interacting with a diverse set of partners and prospective partners.
- Recruiting, selecting and training Sales staff.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, leadership, mentoring, business, accounting and reporting skills.
- Creativity and a flair for innovation.

Internal contacts

Sales staff at all levels, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Customers, Prospective Customers.

Typical experience

8-10 years of Sales experience, coupled with relevant tertiary qualifications.

Other comments

Products, services and solutions sold, or market sectors created by this role would be passed onto Sales Representatives or Account Managers once they have been established as standard entities within the organisation.

Position Description

Position title: Business Development Specialist
Position code: 11120
Level: 4

Responsible for

Sourcing relationships with clients and key decision makers to develop business opportunities for a new sector, product, service, solution or client.

Report to

Business Development Manager.

Supervises

No supervisory responsibilities.

Main activities

- Developing a market sector by generating sales leads for a brand new organisational product, service or solution. This may be done when the product, service or solution is still in the pipeline.
- Assessing potential partners, performing competitive research, evaluating proposed deals/partnerships and analysing and developing business cases for new business targets.
- Developing new products, services or solutions by combining several existing products/services and generating leads to establish a corresponding market sector in order to gain new business for the organisation.
- Combining existing products/services for a specific client thereby creating a new product, service or solution that once sold becomes a standard organisational offering.
- Generating term sheets and new business/financial models and drafting and negotiating contracts.
- Identifying opportunities for business improvement and strategic new business opportunities.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, business, accounting and reporting skills.
- Creativity and a flair for innovation.

Internal contacts

Sales staff at all levels, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Customers, Prospective Customers.

Typical experience

5-8 years of Sales experience and may either possess or be working towards relevant tertiary business qualifications.

Other comments

Products, services and solutions sold, or market sectors created by this role would be passed onto Direct End User Sales Representatives or Account Managers once they have been established as standard entities within the organisation.

Position Description

Position title: Sales Administration/Internal Sales Team Leader
Position code: 11130
Level: 3

Responsible for

Leading a team of Sales Administration/Internal Sales Staff to provide administration support to the Sales Team.

Report to

Sales Administration/Internal Sales Manager, Sales Manager, Senior Sales Manager, Sales Business Unit Manager.

Supervises

Sales Administration/Internal Sales staff.

Main activities

- Planning and directing the activities of a team of Sales Administration/Internal Sales staff, ensuring all staff provide optimal administrative support to allow the Sales Team to attain predetermined Sales targets.
- Implementing new and modified Sales Administration procedures, processes and reporting. Identifying and reporting to Management areas for process/procedural improvement.
- Providing administrative support to the production of weekly, monthly, quarterly and yearly Sales statistics including Sales budgets, Sales forecasts, Sales expenses and variance reports.
- Assisting with the maintenance and updating of the Sales Department manual that details all policies and procedures pertaining to the Sales Department.
- Overseeing the internal Sales process to ensure that all Sales inquiries and orders are being dealt with efficiently and effectively.
- Providing administrative support for the production of tenders, bids and other Sales related documents.
- Receiving inbound Sales orders, providing product information, advice and support to customers, and maintaining effective internal Sales and administrative procedures for the recording of all Sales transactions from receipt of order to dispatch and payment.
- Identifying Sales leads and escalating them to Sales Representatives. Ensuring the maintenance of the Sales database.
- Receiving and handling customer complaints escalated by members of the team and related to the sale of the organisation's products/services. Escalating unresolved complaints to Management.

Key skills

- Leadership, mentoring and communication skills.
- Attention to detail, analysis and problem solving capabilities.
- Excellent organisational, administrative and reporting skills.
- Sound product/service knowledge.

Internal contacts

Sales Management, Marketing staff, Finance and Administration staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

2-5 years of experience, coupled with administrative qualifications and may possess or be working towards tertiary qualifications.

Other comments

Position Description

Position title: Sales Administrator/Coordinator/Internal Sales Representative
Position code: 11135
Level: 2

Responsible for

Receiving inbound Sales orders, providing product information, advice and support to customers, and maintaining effective internal Sales and administrative procedures for the recording of all Sales transactions from receipt of order to dispatch and payment.

Report to

Sales Administration/Internal Sales Manager, Sales Manager.

Supervises

No supervisory responsibilities.

Main activities

- Processing Sales orders and arranging the dispatch of products/services sold.
- Receiving inbound customer Sales inquiries and providing quotations, product/service information, support and pricing details in response to inbound enquiries, promoting the features and benefits of the organisation's products/services.
- Maintaining the customer database.
- Maintaining Sales statistics and records of sales performance.
- Providing administrative support for the production of tenders, bids and other Sales related documents.
- Identifying Sales leads and escalating them to Sales Representatives.
- Receiving, handling or escalating customer complaints related to the sale of the organisation's products/services.

Key skills

- Excellent organisational and administrative skills.
- Attention to detail.
- Excellent communication skills and a growing Sales focus.
- Sound product/service knowledge.

Internal contacts

Sales Management, Marketing staff, Finance and Administration staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

Typically 2+ years of experience.

Other comments

Position Description

Position title: Scheme Administration Manager / Operations Manager
Position code: 67025
Level: 5

Responsible for

Managing the Superannuation and/or KiwiSaver scheme administration team.

Report to

Business Manager.

Supervises

Scheme Administration Team Leaders.

Main activities

- Managing 8-10 staff who are responsible for the administration of superannuation or KiwiSaver plans.
- Setting and monitoring work standards within the team. "
- Part of the Superannuation / KiwiSaver management team which monitors the progress of the team as a whole. "
- Dealing with staff management issues: development and delivery, organisation of appropriate training programs; motivation and morale; employee counselling and guidance; direction and assessment including annual performance reviews; recruitment; control supervision.
- Analysing legislation and regulatory issues as they emerge, and ascertaining the administrative impact on clients.
- Dealing with other client service and administration issues: superannuation vesting, legislation, etc.; classification systems, inputting benefits, lump sum tax, etc.

Key skills

- Commercial awareness of the superannuation industry.
- Proven leadership qualities.

Internal contacts

External contacts

Typical experience

At least 2 years background in Superannuation / KiwiSaver Administration. Diploma in Superannuation Management is strongly preferred.

Other comments

Position Description

Position title: Scheme Administration Team Leader
Position code: 67028
Level: 4

Responsible for

Providing a high quality client service for Trustees, participating employers and members of schemes under managed administration. Managing a team of Administrators to ensure the efficient achievement of Performance Standards and meet agreed objectives.

Report to

Scheme Administration Manager / Operations Manager

Supervises

Administration Team.

Main activities

- Managing a single administration team.
- Organising, monitoring and controlling work flow of the team.
- Liaising with consultants in setting priority work and agreeing targets.
- Working with Scheme Administration Manager to aid in technical and personal development of team members.
- Being available as a point of reference for individual team members for technical advice and guidance.
- Providing a high level of service to all clients, both internally and externally.
- Implementing change where appropriate in relation to legislative or procedural change.

Key skills

- Ability to train, motivate and provide feedback to staff.
- Above average written, oral and analytical skills.

Internal contacts

External contacts

Typical experience

At least 12 months background in administration of large funds to develop technical requirements. Certificate of Superannuation Management, and study towards Diploma favoured strongly.

Other comments

Alternative Titles: Team Leader

Position Description

Position title: Senior Scheme Administrator
Position code: 67030
Level: 3

Responsible for

Administering and liaising closely with a number of schemes with some large, complex or difficult funds. (As a guide to the size of the job, the incumbent would be responsible for approximate 10 plans with an average of 100-300 per plan.)

Report to

Scheme Administration Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Servicing and administering existing accounts and coordinating renewals.
- Completing and checking day-to-day administration matters, usually of a complex nature.
- Processing and checking annual review of all types of funds.
- Attending to benefits design changes.
- Authorising journal entries and cheque requisitions for small amounts.
- Overseeing the submission and implementation of new entrants for employers.
- Attending to telephone and written client inquiries relating to plans, including researching complex client queries and presenting results to clients.
- Assisting management in the development and attainment of new business.
- Assisting in running section by training and assisting new staff.
- May assist Supervisor with performance appraisal process.

Key skills

- Ability to work independently, prioritise and multi-task.
- Excellent interpersonal, written and oral communication skills.
- Ability to deal with clients at all levels and solve complex issues.
- Ability to train, develop and mentor Team Members.

Internal contacts

Management, Superannuation department.

External contacts

Clients, Advisers, Industry Bodies and Associations.

Typical experience

At least 5 years experience in Superannuation / KiwiSaver Administration, together with relevant qualifications in Superannuation Management.

Other comments

Position Description

Position title: Scheme Administrator - Level 3
Position code: 67035
Level: 2

Responsible for

Administering a number of schemes or employer groups within a fund.

Report to

Scheme Administration Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Processing and checking new entrants for employers and benefit payments of a more complex nature.
- Performing complex reconciliation of cash.
- Dealing with telephone and written enquiries relating to plans.
- Completing annual reviews of a basic nature.

Key skills

- Good numeracy and communication skills.
- Ability to plan and organise own and other work.
- Good knowledge of superannuation.
- Good interpersonal and team member skills.

Internal contacts

External contacts

Typical experience

At least 3 years of experience in Scheme Administration.

Other comments

Position Description

Position title: Scheme Administrator - Level 1-2
Position code: 67040
Level: 1

Responsible for

Administering a number of schemes or employer groups within a fund.

Report to

Scheme Administration Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Processing and checking new entrants for employers and benefit payments.
- Performing reconciliation of cash.
- Dealing with telephone and written inquiries relating to plans.
- Completing annual reviews of a basic nature.

Key skills

- Good numeracy and communication skills.
- Ability to plan and organise own and others work.
- Good knowledge of superannuation.
- Good interpersonal and team member skills.

Internal contacts

External contacts

Typical experience

Up to 3 years of professional experience within Scheme Administration.

Other comments