

## JOB DESCRIPTION

---

### DELIVERY SPECIALIST

**Reports To:** Team Leader/Operations Manager, ANZ Solutions Group

**Direct Reports:** None

#### PRIMARY FUNCTIONS

Responsible for the management and customer care across varied customer accounts within the ANZ Solutions Group space.

Specific focus on the lease origination function including settlement, funding and initial invoice preparation.

Key support contact for all equipment suppliers and our external funding partners.

#### KEY ACCOUNTABILITIES

##### Customer Service

- Ownership of our customers ensuring the provision of timely and value add services while supporting our internal stakeholders in regard to all aspects of the deal origination process.
- Build and maintain relationships with a pool of key accounts within the relevant ANZ Solutions Group team together with the equigroup Business Development team to strive for optimum customer experience and overall profitability targets.
- Provide support as main contact for our key supplier and partners for all operational matters regarding deal origination. In regard to direct customer engagement this will be in coordination with the Portfolio Specialist especially in regard to issues or escalations.
- Adhere to customer satisfaction standards in terms of query response times and resolution management.
- Partner with the Senior Delivery Specialists in terms of process improvements, customer satisfaction feedback and projects.

##### Analysis and Reporting

- Provide assistance to Team Leader/Operations Manager and Finance Teams for relevant reporting and periodic close requirements.
- Partner reporting summaries as requested or mandated for new originations.
- Identification of process improvement opportunities and assistance with implementation at front end.
- Support the Head of Internal Sales & Delivery ANZ in overall portfolio activity reporting and any other ad-hoc requests when required.

##### Additional responsibilities

- To carry out general administrative duties that support the ANZ Solutions Group.

- To carry out other duties when required to support the ANZ Solutions Group and/or regional team.
- To proactively seek self-development through regular 1:1 meeting, performance reviews and career development offerings.
- Provide assistance and support as a subject matter expert (SME) for on-going process improvement, customer, IT and business-related projects.
- Any other duties and/or projects as required.

## **KEY PROCESSES**

- Respond to and input new settlement requests.
- Ensure accurate data entry from supplier invoices and statements leveraging internal systems.
- Creation of customer settlement packs for issue to both internal and external customers.
- Complete funding partner compliance requests including general authorities, credit requirements, legal documentation, etc.
- Track and follow up with customer in terms of lease agreement execution.
- Liaise on a regular basis with our external funding partners (Bank) in terms of final deal execution and payment to our suppliers.
- Main point of contact for supplier queries relating to current, new or completed settlements.
- Regular engagement via documented meetings with Business Development to provide input and feedback on customer issues, behaviours, and new business opportunities.
- Assistance with End of Lease queries, working alongside the Portfolio Team as required
- Assistance with Invoicing and Cash queries, working alongside the Cash Operations and Reconciliation team as required.

## **EMPOWERMENT**

- Answer all technical / process related questions.
- Investigate, discuss, and challenge current processes, and implement agreed changes.
- Manage profitability per customer as outlined within delegated authority.

## **PERFORMANCE MEASURES**

- Productivity:
  - Data Accuracy and secondary peer checking
  - Error rate and quality metrics (count of rework and rejections from partner)
  - Document turnaround time and expiries
  - Volume based metrics (dollar value and number of new lease schedules managed) regarding all lease originations
- Customer outcomes:
  - Response times for query management queues within set SLA (end-customer and partner)
  - Supplier resolution and dispute management
  - Customer satisfaction metrics including feedback, surveys and informal response
- Innovation:
  - challenge processes and continue to drive a proactive solutions focus

## **KEY RELATIONSHIPS**

- Key Accounts/High Care Customers
- Team Leader/Operations Manager
- Business Development
- Finance
- Commercial team
- Contract Management
- IT

## **COMPLIANCE**

- All internal Company policies
- Bank policies (where applicable)
- Quality Manual
- Clear demonstration of equigroup's core values in all aspects of professional conduct.
  - Responsibility
  - Integrity
  - Unity
  - Creativity
  - Empowerment
  - Excellence

## **PERSON SPECIFICATION**

### **1. EXPERIENCE**

#### **Essential**

- Minimum 3-5 years' experience in a finance, banking, services or commercial orientated role.
- Experience with workflow queues, customer management, CRM.
- Customer service orientated – preferably with a high-volume transactional business.

#### **Desired**

- Experience with asset management within the finance/leasing industry.
- Experience in processing financial transactions.
- Solid understanding of Information Technology.

### **2. EDUCATION**

#### **Essential**

- Tertiary qualification in a related discipline, eg. Business, Finance, Commerce.

#### **Desired**

- Finance/industry related professional development studies.

### **3. SKILLS / ABILITIES / KNOWLEDGE**

#### **Essential**

- Strong attention to detail
- Excellent MS Office skills (specifically Word and Excel)
- Excellent planning and organising skills
- Excellent communication skills (both written and oral)
- Customer focused and task oriented
- Team player who displays tenacity, initiative and innovation