

JOB DESCRIPTION

TEAM LEADER – INTERNAL SALES & DELIVERY, ANZ

Reports To: Head of Internal Sales & Delivery, ANZ
Direct Reports: Delivery Specialists, Internal Sales Representatives

PRIMARY FUNCTIONS

Responsible for the day-to-day queue management and task coordination of the ANZ Customer Delivery & Internal Sales Team, with a primary responsibility of ensuring the accurate and timely processing of settlements, as well as the effective tracking and allocation of all settlement-related or customer-service activities.

To provide agents with overarching leadership and management of all tasks that contribute to or make up the end-to-end settlement process from supplier/client engagement through to funding. Lead communication and relationships with all required internal and external stakeholders, with particular focus on lender operational teams.

Provide assistance to the Head of Internal Sales & Delivery – as well as other Operational Managers, as required - in the design and implementation of effective workflows to highlight both exceptions and ongoing performance levels of delivery agents. This includes, but is not limited to, customer-feedback, query management, partner reporting and account & lead management in internal CRM systems.

KEY ACCOUNTABILITIES

Delivery

- Daily management and coordination of PartnerAdvantage workflow across all Delivery Specialists, including workflow tracking and escalation review with senior manager.
- Review and approval of flow business deal processing – within assigned delegation – and coordination of any non-standard processes across the delivery team and external parties, i.e. Asset Finance Operations
- Working alongside operational manages for the production/communication of regular partner reporting, including coordination and publishing of all commentary and root causes
- Relationship owner for partner operational teams
- Assistance with data entry and deal processing (settlement processing) where required
- Conduct regular 1:1s, performance conversations with all Delivery specialists.

Internal Sales

- Manage the timely and accurate completion of CHG customer deals by Internal Sales, in coordination with other key internal stakeholder teams.
- Actively engage with CHG Sales and Services Team in all pre-sales activity related to customer and supplier onboarding

- Represent the CHG ANZ Internal Sales team in all Global Head Office activities as required.
- Regularly liaise with Head of Internal Sales International on operational issues related to internal sales.
- Conduct regular 1:1s, performance conversations with all Internal Sales agents.

Customer Service

- Lead in all customer service and customer request tracking, including measurement of customer feedback levels and implementation of customer-service measurements
- Oversight of FrontApp email application to ensure timely responses to customers.
- Build and maintain relationships with a pool of key accounts with all Business Development Managers across EQG and CHG channels for optimum customer experience.
- Continual engagement with all operational managers – including portfolio - on all feedback and complaints, including recommendation on processes to improve and/or change

Sales & Business Development

- Key liaisons point for Sales and Business Development Managers for the assignment of deals and escalations where required; this includes active engagement with all stakeholders where there are delays with expected volume
- Daily tracking and communication point at month and quarter-end to all business leaders as required.
- Key operational representative as an “Account Manager” in customer meetings, as and when required by the sales team.

Additional responsibilities

- To carry out general administrative duties
- To lead and assist with process improvement initiatives
- To carry out other duties when required to support the Customer Solutions Senior Manager and support effective reporting of the team performance back to the business.
- To be the key liaison point between Business Development and Operations where required, including customer-meetings as an operational representative
- Any other duties and/or projects as required

KEY PROCESSES

Query Management

- Customer Solutions Inbox management (FrontApp oversight and management)
- VIC School Customer Service coordination and Assignment of workload and deal requests to appropriate delivery specialists according to workloads and number of requests.
- PA Account Management and status updates
- iClass Account Management
- Track and follow up with customer in terms of lease agreement execution, and with all internal and external stakeholders for deadlines.

Settlements

- Ensure accurate data entry from supplier invoices and statements leveraging internal PA systems
- Creation of accurate and timely customer settlement packs

- Complete funding partner compliance requests including general authorities, credit requirements, legal documentation etc
- Liaise on a regular basis with our external funding partners in terms of final deal execution and payment to our suppliers
- Regular engagement via documented meetings with Business Development to provide input and feedback on customer issues, behaviors, new business opportunities.

Analysis & Reporting

- Identification – and implementation where possible – of process improvement opportunities
- Support to Head of Internal Sales & Delivery in overall activity reporting and any other ad-hoc requests when required.

EMPOWERMENT

- Ownership of workflow assignment for all settlement-related activities.
- Ownership of query management across the ANZ Delivery and Internal Sales.
- Review of all lead and account set up processes, including recommendations for change,
- Answer all technical / process related questions related to settlement and funding activities.
- Investigate, discuss, and challenge current processes, and implement agreed changes
- Manage profitability per customer as outlined within delegated authority.
- Manage relationships with key operational stakeholders.

PERFORMANCE MEASURES

- Productivity
 - Overall Delivery Team Data Accuracy and Turnaround Times
 - Overall Delivery Team Error rate and quality metrics
 - Document turnaround time and expiries.
 - Volume based metrics (Dollar value and number of new lease schedules managed) regarding all lease originations.
 - Process improvement initiatives.
- Customer outcomes
 - Response times for query management queues within set SLA (end-customer& partner)
 - Customer Feedback and Complaints (including implementation of escalation and reporting)
 - Customer satisfaction metrics including feedback, surveys and informal response

KEY RELATIONSHIPS

- Key Accounts (suppliers and customers)
- Sales & Business Development
- Customer Service (including portfolio and internal sales, where applicable)
- Finance & Cash Operations
- External Funders

COMPLIANCE

- All internal Company policies

- Internal Funding and Treasury policies (CHG)
- Bank policies (where applicable)
- Quality Manual

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 multitasker, able to work across platforms
- Excellent MS Office skills (specifically Word and Excel)
- Excellent planning and organizing skills
- Excellent communication skills (both written and oral)
- Customer focused and task oriented
- Team player who displays tenacity, initiative and innovation