

Catholic Development Fund Position Description

Position title	Executive Manager, Client Experience
Department	Client Services
Reports to	General Manager Client Services
Number of direct reports	9
Location	Head Office

Position purpose

Reporting to the General Manager, Client Services, the Executive Manager, Client Experience will transform and manage the delivery of high quality financial services to clients.

In the current state, this position is accountable for leading a team to accurately and efficiently processing client transactions and for the relationship with the Fund’s wholesale clients for transactional banking requirements.

CDF is currently undertaking an IT Transformation programme that will benefit 20 development funds across Australia and New Zealand. Linked to client expectations and the IT Transformation, the Executive Manager, Client Experience will establish and lead an ongoing programme to improve and streamline internal and client driven operations processes for Melbourne CDF.

Further to this, the role will support and influence the 19 other funds across Australia and New Zealand to implement similar operational process changes.

The Executive Manager, Operations will support, train & mentor a team of account executives who will work with their allocated Relationship & Snr Relationship Managers and their clients.

Position responsibilities

- Within the framework of the CDF Strategic Plan, develop and maintain a detailed Business Plan for providing transactional services to CDF clients
- Formally mapping and recording formal operational processes for our wholesale clients. This plan is to include key challenges, opportunities & potential new markets for existing operations for the Client Services team.
- Develop, manage and execute an ongoing programme of work to transform the operational and customer processes followed by Melbourne CDF and 19 other funds across Australian and New Zealand.
- Initiate the design, development and testing of system and or process enhancements and upgrades, whilst managing key stakeholder engagement and involvement. This may also include working with NAB, Ultradata, and various teams across CDF.
- Develop, manage and execute change management strategies internally, with clients and with other funds as rolling process enhancements are made.

- Report on the status along with the implementation of the Business Plan at fortnightly Executive Management Meetings.
- Support the day to day Client Services work flow for the business including; daily work allocation, training & development of new skills and processes, supporting problem & conflict resolution, performance evaluation and the building of an effective and dynamic team.
- Mentor and develop a small team of Account Executives, including ensuring that they have been provided with up to date position descriptions, clarity on key performance indicators, management of HR related functions for the team (including Annual leave, RDO's, sick leave, long service leave, etc).
- Supporting and working in partnership with CDF Relationship & Snr Relationship Managers to deliver transaction services to CDF clients.
- Establish Service Level Agreements for managing workflows within the Client Services team. Monitor and report on performance relative to these SLAs

Position requirements

Key Competencies

- Focuses on the Client – Understands client needs in order to deliver simple and convenient solutions that are valued by the client and commercial for CDF. Anticipates and responds to evolving needs of client groups
- Leads and Empowers – Sets clear direction, builds well balanced teams, coaches, engages and empowers others to deliver. Draws on a range of communication, influencing and leadership styles to ensure that outcomes are achieved.
- Manages Change – Demonstrates openness to change and successfully manages self and leads others through change. Encourages open and constructive dialogue around change. Adapts future approaches to change on the basis of previous experience and approaches.
- Broadens Understanding – Gathers and evaluates diverse perspectives and information to create innovative opportunities for CDF and its clients now and in the future.
- Structuring Work – Adding structure to a multitude of different tasks.
- Transferring Expertise – Conveying knowledge, insights and expertise to others in a formal and informal way to influence and drive change.

Education/qualification	<p>Essential</p> <ol style="list-style-type: none"> 1. Relevant undergraduate business qualifications or experience in a like environment 2. Previous experience in a financial institution 3. Well developed analytical and reporting skills 4. Proven leadership & coaching skills and management experience <p>Desirable</p> <ol style="list-style-type: none"> 1. Relevant post graduate business qualifications 2. Experience in delivering projects using an agile approach 3. Previous experience working in an operations team in a financial institution.
Key Stakeholders	<p>Internal</p> <ul style="list-style-type: none"> • Relationship Managers • CDF Finance, Risk and Treasury teams • Board and its committee • CEO and Executive Team <p>External</p> <ul style="list-style-type: none"> • Transaction banker (NAB) • Investors and borrowers – Parishes, schools, congregations, welfare organisations, hospitals and aged care operators. • Other development funds across Australia and New Zealand • Prospective clients; • Service providers (Monitor, Ultradata etc.) • Management and staff of Catholic Education Melbourne, Catholic Education Office Sale. Catholic Education Office WA. • Management and staff Archdiocese or Melbourne, Diocese of Bunbury and Diocese of Sale (Owners)

CDF's employee values

Values – CDF is practically tasked with the provision of capital to Catholic organisations to support their growth and it does so consistent with the mandate above. The manner in which CDF seeks to undertake its work is also guided by scripture. The following scripture have been identified as particularly relevant:

- Care for others – *'I give you a new commandment: love one another; you must love one another just as I have loved you. It is by your love for one another, that everyone will recognise you as my disciples.'* John 13:34-35
- The importance of wealth – *'Do not lay up for yourselves treasures on earth, where moth and rust destroy and where thieves break in and steal, but lay up yourselves treasures in heaven, where neither moth nor rust destroys and where thieves do not break in and steal. For where your treasure is, there your heart will be also.'* Matt 6:19-21
- Sharing wealth – *'And the crowds asked him, "What then shall we do? And he answered them, "Whoever has two tunics is to share with him who has none, and whoever has food is to do likewise."* Luke 3:10-11
'Jesus looked up and saw the rich putting their gifts into the offering box, and he saw as poor widow put in two small copper coins. And he said "Truly, I tell you, the poor widow has put in more than all of them. For they all contributed out of their abundance, but she out of her poverty put in all she had to live on".' Luke 21:1-4