



POSITION DESCRIPTION AXA NZ

(Version 1.0 Created 05/2010)

POSITION TITLE:	Client Document Centre (CDC) and Payments Team Manager	Last Modified
		May 2010

Functional Unit:	Adviser & Customer Service	Division/Team:	CDC
POSITION CODE: <i>(completed by HR)</i>		GRADE 1-9 /PACKAGED: <i>(completed by HR)</i>	7
PURPOSE OF POSITION:	Responsible for leading and developing a team whose function is to achieve agreed service standards and improve/optimize processes to deliver an enhanced service experience to internal and external customers		
REPORTING TO (POSITION TITLE):	DIRECT		INDIRECT
	General Manager, Adviser & Customer Service		
NO. OF REPORTS:	DIRECT		INDIRECT
	10-12		
KEY RESPONSIBILITIES: <i>(include financial responsibilities)</i>	<p>Key responsibilities of this role include:</p> <ul style="list-style-type: none"> ▪ managing the cash receipting and cheque collation functions ▪ managing the document registration functions ▪ managing a timely and effective adviser and internal mail service ▪ taking the lead in dealing with payment and document registration-related incidents including communicating with relevant stakeholders, co-ordinating plan with internal stakeholders to respond to impacted customers to mitigate the impact, work with relevant parties to identify the root cause of the incident and recommend/implement improvements to reduce the risk of recurrence <p>Provide the team with guidance, workflow management, feedback, coaching, training and problem resolution to improve individual and team performance. Complete regular performance reviews of staff and demonstrate a commitment to promoting and encouraging leadership competencies and scorecard measures.</p> <p>Assist the team in establishing priorities to provide exceptional service, deliver business results and build effective internal and external customer relationships</p> <p>Regularly review the team's re-sourcing model to ensure changes in AXA's service offering are well supported at all times. Recruit, develop and deploy staff to meet service expectations within agreed staffing budgets</p> <p>Maintain quality performance and service standards in an environment characterised by demand for profitability, managing resources and developing innovative solutions</p> <p>Develop and maintain a proactive customer and Adviser approach, and process and service improvement culture within the team.</p> <p>Identify and communicate trends and issues affecting business performance</p> <p>Identify, recommend and manage the implementation of service, technology and process improvement opportunities where these have a wider business impact and/or will deliver better service and business results.</p>		

<p>KEY MEASURES: <i>(include financial targets)</i></p>	<p>Pro-actively maintain a comprehensive quality programme to assure quality and reduce the volume of complaints; including regular reporting and provision of coaching and feedback</p> <p>Ensure all business processes are documented and updated on a regular basis.</p> <p>Pro-actively manage relationships and review agreements where appropriate with Vendors and Suppliers to ensure AXA received maximum value for money for the services provided. <u>Identify opportunities to improve service offering and reduce costs.</u></p> <ul style="list-style-type: none"> ▪ Proactively identifying issues relating to registration/receipting/payments queries, investigate and understand causes and effects and contribute to problem resolution and improvement ▪ Complaints and escalated issue handling ▪ Staff engagement ▪ Operational service standards ▪ End to end cycle time for new business ▪ Continuous improvement activities ▪ Special projects 				
<p>DECISION MAKING RESPONSIBILITY:</p>	<p>Deployment of resources within the team in order to meet service standards.</p> <p>Cost centre management (including projections, monitoring against budget and implementing planned cost savings).</p> <p>Management expenditure authority for staff costs and administration costs in accordance with pre-determined budgets.</p> <p>Applicable expenditure authority for relevant product, income and disbursement accounts as prescribed in the AXA APH Delegated Authorities register.</p>				
<p>KEY INTERNAL & EXTERNAL CUSTOMERS:</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%; text-align: left;">KEY CUSTOMER</th> <th style="width: 50%; text-align: left;">PURPOSE OF RELATIONSHIP</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;"> <p>Internal</p> <ul style="list-style-type: none"> ▪ A&CS teams (including the AXA Business Service team in Bangalore) ▪ Other departments – Marketing and FP Product, Distribution, AXA GI, Legal and Compliance, Finance, People and Projects ▪ Staff in the Auckland and Christchurch offices ▪ Payment/Suspense support team located in AXA’s Melbourne office <p>External</p> <ul style="list-style-type: none"> ▪ Advisers ▪ Adviser Support staff ▪ Customers ▪ Vendors and Suppliers (for example NZ Post, Mail houses, Document storage companies, banks) </td> <td style="vertical-align: top;"></td> </tr> </tbody> </table>	KEY CUSTOMER	PURPOSE OF RELATIONSHIP	<p>Internal</p> <ul style="list-style-type: none"> ▪ A&CS teams (including the AXA Business Service team in Bangalore) ▪ Other departments – Marketing and FP Product, Distribution, AXA GI, Legal and Compliance, Finance, People and Projects ▪ Staff in the Auckland and Christchurch offices ▪ Payment/Suspense support team located in AXA’s Melbourne office <p>External</p> <ul style="list-style-type: none"> ▪ Advisers ▪ Adviser Support staff ▪ Customers ▪ Vendors and Suppliers (for example NZ Post, Mail houses, Document storage companies, banks) 	
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<p>TECHNICAL COMPETENCIES:</p>	<p>Broader skills/ attributes:</p> <ul style="list-style-type: none"> ▪ Understanding of attitudes, values and motivations for behaviour ▪ Draw on a well developed network and understanding of information requirements within relevant categories and functional units ▪ Proven success in leading a highly effective unit of a similar size ▪ An understanding of the practices and techniques of workflow management ▪ Excellent written and verbal communication skills ▪ Advanced analytical skills <p>Business process knowledge, commercial awareness.</p>				
<p>EXPERIENCE & QUALIFICATIONS:</p>	<p>Qualifications:</p> <ul style="list-style-type: none"> ▪ Tertiary qualifications within business/management discipline is desirable <p>Experience:</p>				

**LEADERSHIP
LEVEL:
OPERATIONAL
LEADERSHIP**

- At least five years professional experience within Financial Services and/or Customer Service industries at a management level with a particular focus on an administration document management , accounts payable/receivable and/or transaction based areas

**LEADERSHIP BEHAVIOURS FOR OPERATIONAL LEADERSHIP
LEVEL:**

BUILD TO GROW

Strategic vision

- Understands strategic themes and applies them in an operational context
- Recognition and awareness of opportunities and trends
- Demonstrates knowledge of own area of expertise and a broader understanding of AXA business

Building capability

- Provides specific, timely constructive feedback on performance
- Coaches team members to enhance their individual performance

FOCUS ON CUSTOMER

- Knows competitors within the industry and understands the product/services provided
- Strives to exceed customers' expectations through high quality service and delivery outcomes
- Understands new customer segments and trends
- Establishes and maintains effective relationships with customers through achieving mutually agreeable solutions

CATALYSE HIGH PERFORMANCE

Team leadership

- Provides understanding and encourages commitment by team members on team goals, roles and responsibilities
- Rewards and recognises team members who demonstrate commitment and achievement of team goals
- Seeks detail, analyses and considers various alternatives
- Encourages team to accept accountability and ownership of team goals

Change leadership

- Promotes and provides understanding of organisational decisions to the team, recognising impact or implications a decision may have
- Acknowledges and supports team members who demonstrate initiative for change opportunities

SHARE TO SUCCEED

- Promotes supporting of and collaborating with other teams
- Encourages team to respect individual differences
- Actively encourages contribution to team objectives
- Provides expertise and shares knowledge to positively develop others
- Effectively balances individual and team goals

LEAD THROUGH ACTIONS

Results orientation

- Promotes and demonstrates achievement of team goals
- Implements ongoing improvements to continually enhance performance

Living through AXA values

- Promotes AXA values and acts accordingly
- Accepts and supports difficult or unpopular messages