



POSITION DESCRIPTION AXA NZ

(Version 1.0 Created 06/2008)

POSITION TITLE:	Team Leader – Wealth Management Administration (WMA)	Last Modified <i>24 Feb 2010</i>
------------------------	--	--

Functional Unit:	ADVISER & CUSTOMER SERVICE	Division/Team:	Wealth Management Administration (WMA)
POSITION CODE: <i>(completed by HR)</i>		PACKAGED: <i>(completed by HR)</i>	<i>tbc</i>

This role will support the Manager by supervising a team of Administrators to deliver a range of services which meet (and exceed) business targets and the expectations of advisers and customers.

The person in this role will manage the day to day operations of either the KiwiSaver or the SMT & Investments teams within WMA; effectively forecast and manage workflow, coordinate work; and complete hands on processing as required.

This role will work with WMA Administrators to ensure they meet required skill levels in terms of systems, products and processes. This includes reviewing staff performance and providing feedback and coaching to improve performance, particularly to ensure that staff take a solutions view (rather than a transaction view) to customer requests.

PURPOSE OF POSITION:

The person will work closely with WMA Senior Technical Advisers to quality assure work and identify and deliver training. In addition, these roles will work closely to ensure that staff have the appropriate information and tools to work effectively.

Working closely with the Senior Technical Advisers, this role will be responsible for ensuring that complaints and escalated or complex queries are responded to in a timely and effective manner.

The role will maintain good working relationships with key customers, financial advisers, other superannuation providers, the Inland Revenue, and other parties, to ensure their needs are met, and seek continuous improvement in service. In the KiwiSaver team, this will include monitoring the service levels between Inland Revenue and AXA, and coordinating the ongoing relationship management.

The role will identify areas for continuous improvement and undertake and/or co-ordinate the activities identified to improve the levels of service we provide our customers. As such, the role will lead and be involved in project work.

REPORTING TO

DIRECT

INDIRECT

(POSITION TITLE):	<ul style="list-style-type: none"> ▪ <i>WMA Manager</i> 	
NO. OF REPORTS:	DIRECT	INDIRECT
KEY RESPONSIBILITIES: <i>(include financial responsibilities)</i>	<ul style="list-style-type: none"> ▪ <i>5-11 (the team may vary in size according to business needs at that time)</i> ▪ <i>Nil</i> ▪ <i>Provide team leadership and motivate team members</i> ▪ <i>Manage team and individual performances to achieve business targets</i> ▪ <i>Work with the manager to monitor quality, provide feedback and coordinate/deliver training. Ensure that training and procedural documents are maintained and used appropriately.</i> ▪ <i>Ensure that appropriate documentation is kept current and used effectively, such as training material, procedural rules and client files.</i> ▪ <i>Perform efficient and accurate processing</i> ▪ <i>Address complaints and complex queries</i> ▪ <i>Support the Manager and IS to ensure the integrity of systems</i> ▪ <i>Maintain good working relationships and communications with internal and external stakeholder</i> ▪ <i>Work on projects as required</i> ▪ <i>In Manager's absence, act in areas advised by Manager</i> 	
KEY MEASURES: <i>(include financial targets)</i>	<ul style="list-style-type: none"> ▪ <i>adviser and customer satisfaction</i> ▪ <i>accuracy / quality measures for WMA team</i> ▪ <i>timeliness and efficiency measures for WMA team</i> ▪ <i>staff satisfaction</i> ▪ <i>budget adherence</i> 	
DECISION MAKING RESPONSIBILITY:	<p><i>Authority within advised guidelines & limits of role including:</i></p> <ul style="list-style-type: none"> ▪ <i>Authority to deploy resources as volume and processes dictate</i> ▪ <i>Applicable expenditure authority for relevant product, income and disbursement accounts.</i> ▪ <i>Escalation point for complex query and complaint resolution</i> ▪ <i>Sign off authority for all Wealth Management products</i> 	
KEY INTERNAL & EXTERNAL CUSTOMERS:	KEY CUSTOMER	PURPOSE OF
TECHNICAL COMPETENCIES / PERSONAL ATTRIBUTES	<ul style="list-style-type: none"> • <i>Understanding of the Financial Services Industry</i> • <i>Understanding of superannuation and investment environment and products</i> • <i>strong analytical and mathematical skills</i> • <i>strong PC and electronic communication skills</i> ▪ <i>strong oral and written communication skills</i> ▪ 	
EXPERIENCE & QUALIFICATIONS:	<ul style="list-style-type: none"> ▪ <i>Team leadership experience</i> ▪ <i>Coaching and staff development experience</i> ▪ <i>Tertiary qualification</i> 	

**LEADERSHIP
LEVEL:
SELF
LEADERSHIP**

LEADERSHIP BEHAVIOURS FOR SELF LEADERSHIP LEVEL:

BUILD TO GROW

Strategic vision

- Understands operational expectations for own role and team
- Initiates action in order to achieve agreed goals
- Demonstrates knowledge of AXA products and services related to own role

Building capability

- Recognises areas for self improvement
- Takes accountability to actively seek development opportunities that will contribute to high performance

FOCUS ON CUSTOMER

- Has an understanding of the competitors and the industry
- Meets and strives to exceed internal and external customer requirements
- Adjusts work priorities to achieve customer needs
- Takes accountability for customer needs and builds rapport with customer

CATALYSE HIGH PERFORMANCE

Team leadership

- Contributes to and supports the achievement of team goals
- Takes accountability to achieve agreed goals within timeframe required
- Understands the responsibilities of team and how role relates with team members and other teams

Change leadership

- Supports and understands organisational decisions and change
- Positively accepts change

SHARE TO SUCCEED

- Actively assists team members and supports other teams where possible
- Accepts individual differences
- Seeks to contribute to team discussion and support outcomes
- Readily shares information with others at the time of receiving knowledge

LEAD THROUGH ACTIONS

Results orientation

- Strives for high performance
- Identifies problems and strives to understand primary cause
- Identifies areas for improvement that can support high performance

Living through AXA values

- Understands and supports AXA values