

## POSITION DESCRIPTION

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<b>Position title:</b>	<b>Retention &amp; Customer Experience Specialist</b>
<b>Location:</b>	<b>Head Office, Geelong</b>
<b>Reports to:</b>	Customer Retention Manager
<b>Entities:</b>	GMHBA, Frank
<b>Organisational level:</b>	Technical Specialist
<b>Reports:</b>	Nil

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### Job Purpose:

To plan, execute and optimise customer retention activity across multiple work streams. This role will involve taking proactive ownership of retention activity briefs and building campaigns from implementation planning through to live.

### Accountabilities:

#### Project Management

- Manage the delivery of retention activity to meet key strategic, commercial and financial objectives.
- Report progress of retention programs to the Customer Retention Manager.
- Manage costs, timings and resources for retention projects.
- Design/optimize activity that positively impact GMHBA's customer retention rates.
- Explore internal data, modelling and segmentation to identify retention opportunities
- Takes action that is consistent with available facts, constraints and probable consequences.
- Collaborate and seek input from specialist functions and others as required, to maximise performance outcomes.
- Manage risks, balance priorities and make decisions to progress projects efficiently and with focus on optimal outcomes.

#### Communications / Content Development

- Develop and manage content to appeal to desired consumer segments and target audiences
- Oversee retention content across a range of mediums
- Utilise member communications to drive retention improvements

#### Digital Capabilities

- Plan, optimise and implement retention activity using a variety of digital tools.



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- Plan and deliver of digital campaigns
- Learn and excel in new software tools – particularly Episerver for content management, personalisation and automated campaign setup.
- Utilise CRM and data to improve how we interact with members and increase retention outcomes
- Understand, explore and analyse data to report results, make recommendations and inform key decisions – and communicate these to relevant teams.
- Work with digital specialists from developers, through to designers and content creators to build world class solutions.

### **Reporting & Optimisation**

- Work with a Data specialists to provide regular reporting across retention projects.
- Engage in data-led optimisation, to ensure project results inform continuous improvement across retention projects
- Works with the Customer Retention Manager to assess priority and make daily decisions to improve the overarching strategic plan.
- Provide regular reporting across initiatives and campaigns
- Ensure compliance with key regulations, Acts, Australian Consumer Law and the Company's Delegated Authorities, Business Plan, Policies and Standards.
- Keep up to date with regulatory trends and changes, and ensure the company anticipates and navigates changes successfully.

### **Inter-Departmental Communication**

- Build a clear and compelling retention vision that engages staff across all departments in a cohesive mission
- Inspire the business to think bigger, challenge norms and communicate openly across departments
- Advocate for interdisciplinary work and teams, with open communication and a focus on mutual objectives

### **Other**

- Uphold the company values, culture and performance standards.
- Participate in the design and roll-out of business change programs designed to strengthen GMHBA's performance
- Embrace the mindset and actively contribute towards embedding the GMHBA Way including working in an Agile environment.
- It is not the intention of this position description to limit the scope or accountabilities of the position but to highlight the most important aspects of the position.
- The accountabilities described within may be altered in accordance with the changing requirements of the role.



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## Key Relationships:

### Internal:

- All GMHBA and Frank internal Business Units. In particular the Private Health Insurance and Health Services divisions, CX & digital team, IT, Marketing, Compliance, Operations including front line staff.

### External:

- Members, providers of outsourced services such as creative & design agencies, technology partners, etc.

## Skills, Experience and Qualifications:

### Mandatory

- Experience in developing and executing retention plans and campaigns.
- Tertiary qualifications in a relevant degree in marketing, management, business, commerce, etc.
- 5+ years' experience ideally in a similar or related role
- Strong written communication skills, to create execution planning documents, reports and briefs.
- A good understanding of automation and triggered communications
- Is confident communicating new ideas both verbally and in writing, and interested in continuous knowledge sharing within a close team
- The ability to learn quickly and communicate well will be crucial to the role.
- Ability to manage multiple projects simultaneously and have a strong focus on quality assurance
- Comfortable working with ambiguity and changing priorities in a fast-paced environment
- Enthusiasm to learn new skills, solve customer problems and dig beyond the surface of the role
- Experience interpreting customer data and linking it to the development of campaigns
- Strong commercial and financial acumen.
- Actively engages in and fosters a friendly, harmonious and productive working atmosphere.

### Highly desirable

- Experience working in an Agile environment or understanding of Agile practices.
- Private Health Insurance, financial services or relevant industry knowledge.



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