

## Position Description

### Customer & Marketing Officer

**Location:** Support Centre, Milton

**Branch:** Customer, Marketing and Product

**Reports to:** Sales & Community Engagement Manager

**Direct Reports:** None

**Effective Date of PD:** 19/09/22

#### Primary Objective:

The role of the Customer & Marketing Officer is to:

1. Grow the inbound Contact Centre & assure an excellent experience for prospects & their families.
2. To contribute to the high performance of our digital marketing operations
3. To contribute to sales performance by developing excellent lead management systems.

Success in this role will be measured by CRM accuracy, quality of lead management and prospect experience -& the broader team's sales and occupancy KPI.

#### Key Relationships:

- The position reports to: Sales & Community Engagement Manager
- The position will consult, collaborate and network with: Client Services Advisors, Service Managers, External agencies (vendors), Marketing team, Aged Care options, IT.
- The position has direct and/or indirect reports of: N/A

#### Key Accountabilities:

##### Leadership Accountabilities:

- Demonstrate the ability to personalise the service experience for each client.
- Demonstrate initiative by actively seeking sustainable solutions to problems without instruction, and continually looking for ways to improve efficiency & effectiveness.
- Develop strong internal & external relationships, working effectively within a team environment in alignment of common goals & values.
- Engage and support new team members during the onboarding process and beyond by sharing knowledge and providing peer support.
- Actively seek feedback to guide development. Appraise mistakes as learning opportunities and demonstrate a willingness to engage in challenging situations.
- Understand and acts in accordance with the values and purpose of Lutheran Services aligned with the Lutheran identity & ethos.
- Organise resources & activities into simplified processes to optimise the efficiency of workflow whilst holding client needs central.

**Role Specific Accountabilities:**

- Respond professionally and efficiently to all customer enquiries received via phone, email and CRM
- Optimise the processes and systems for inbound lead capture and distribution.
- Develop and provide regular reports on sales performance.
- Provide support and guidance to our Client Service Advisors (CSAs) to ensure the CRM is always up to date and that leads are nurtured.
- Be available to answer enquiries received via our 1800 number phone at all times & act as overflow for reception from time to time
- Support the implementation of digital marketing operations & reporting.
- Provide support to sales & marketing team as required
- Ensure all enquiries received are actioned in a timely and quality manner.
- Monitor and report on the performance of our overflow call centre.

**Position Requirements:****Essential:**

- *Excellent customer service*
- *Attention to detail*
- *Communication skills*

**Desirable:**

- *4+ years in a customer service/ marketing role*
- *Tertiary Marketing Qualification*
- *Contemporary CRM (ideally HubSpot) experience*
- *Process management*
- *Collaboration*

**Position Dimensions:**

- Number of staff: 0
- This position is not responsible for an operating budget.

**Values and Behaviours:**

At Lutheran Services, we place equal value on the outcomes we achieve and the behaviours we demonstrate. Our competency framework provides the basis of behavioural expectations for all employees (see Appendix).

All positions are accountable to the values and behaviours set out in the Lutheran Services Competency Framework. The Customer & Marketing Officer is a Leader of Self.

**We certify that the content of this position description is an accurate overview of the role to be performed as is currently foreseen. This position statement is not intended to be all-inclusive and may change as reasonably required to meet the needs of the organisation.**

Employee's Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Manager's Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Key Result Area	Competencies	Behaviours	Leaders of Self	Leaders of Teams	Leaders of Leaders	Leaders of Organisation
<b>Our Services</b> As a Lutheran organisation, we focus on serving the whole person including their family and our community.	<b>Person Centred</b> Taking a whole of person approach, we collaborate with our internal and external clients to deliver products and services that meet their expectations and standards. We proactively seek feedback, listen attentively and act to deliver positive client experiences.	<b>Client Focussed</b>	Demonstrates the ability to personalise the service experience for each client.	Ensures that team practices promote a positive experience for each client.	Ensures clients are central to decision-making and ensures organisational practices uphold the individual needs of clients	Drives the development of organisational practices, products and services that promote and maintain a person-centred focus and positive client experience.
		<b>Seeks Feedback</b>	Actively listens to client feedback, with the patience to hear people out and to understand their perspective. Ensures feedback is acted upon by escalating to the appropriate person.	Proactively seeks and values feedback on client experiences, helping the team to manage feedback constructively.	Seeks feedback from peers and a diverse range of stakeholders to understand the client experience. Promotes an environment where client experience feedback is understood, valued and acted upon.	Understands and values diverse perspectives on the client experience. Fosters a culture of continuous improvement by using client feedback to inform strategic decision making.
		<b>Serves through Action</b>	Advocates for client feedback and ensures appropriate services are in place to meet their needs.	Harnesses client feedback data to create action plans for improvement.	Monitors the progress of action plans in their area and harnesses data on the client experience to guide improvements.	Demonstrates a commitment to continuously improve the client experience, by ensuring client experience data is understood and acted upon.
	<b>Own our Outcomes</b> The client voice leads to action. We take professional accountability for improving on key client outcomes and experiences. We continually look for ways to improve and demonstrate our initiative by seeking sustainable solutions to meet our goals.	<b>Sets Goals</b>	Sets and works towards achieving professional goals and objectives.	Sets and work towards achieving team goals and objectives.	Sets and works towards operational goals and rewards the achievement of successful outcomes that align with the strategic plan.	Sets and works towards strategic goals. Translates strategic goals into operational goals and celebrates the shared achievement of outcomes.
		<b>Accountable</b>	Demonstrates personal accountability for achieving successful outcomes.	Identifies opportunities for team performance improvement, taking responsibility for achieving successful outcomes.	Monitors performance improvement and takes responsibility for implementing systems and processes when necessary to achieve successful outcomes.	Embeds a high-performance culture, monitoring key organisational performance indicators and taking action to achieve successful outcomes and learn from failure.
		<b>Takes Initiative</b>	Demonstrates initiative by actively seeking sustainable solutions to problems without instruction, and continually looking for ways to improve efficiency and effectiveness.	Demonstrates initiative by continually looking for ways to improve efficiency and effectiveness of the team.	Shares ownership and visibility of best practice activities and achievements across the organisation.	Is a constant source of inspiration to others through own leadership initiative and enthusiasm for the organisation.
<b>Our People</b> Our staff, our volunteers and our partners reflect our fundamental capability to provide service.	<b>Foster Collaborative Relationships</b> Trust based, collaborative relationships are formed with others, through encouraging the alignment of common goals and values. We consult with others and listen closely to understand, enabling us to adapt our communication to the other's unique needs and situation.	<b>Builds Relationships</b>	Develops strong internal and external relationships, working effectively within a team environment in alignment of common goals and values.	Builds strong collaborative relationships internally and externally, enabling the team to function effectively in alignment of common goals and values.	Maintains strong relationships internally and externally to enable collaborative cross-functional effectiveness in alignment of common goals and values.	Fosters strong partnerships with internal and external stakeholders to capitalise on strategic opportunities for collaboration in alignment of common goals and values.
		<b>Collaborates</b>	Works effectively and co-operatively within a team and within community.	Works effectively and co-operatively with others to achieve team objectives. Role-models collaboration, cooperation and teamwork.	Seeks opportunities and ways to work with others to achieve shared goals. Is open to opportunities for collaboration within the organisation.	Leads collaboration from both within the organisation and beyond organisational and disciplinary boundaries to achieve results and learn from others.
		<b>Develops People</b>	Engages and supports new team members during the onboarding process and beyond by sharing knowledge and providing peer support.	Assists and listens to others to identify their development needs. Provides actionable feedback to develop team members and delegates work that will create learning and development opportunities.	Fosters a supportive environment that inspires self-improvement and growth. Mentors others and finds ways to creatively challenge and develop others.	Promotes a culture where learning and development is valued, supported and rewarded.
	<b>Committed to Growth</b> Our individual contribution is seen as an inspiration to others. With a focus on self-development and self-care, and a desire to achieve one's potential, we are receptive to feedback and deliberately engage in challenging situations that will enable growth.	<b>Responsive</b>	Remains receptive to coaching, actively seeking feedback to guide development. Appraises mistakes as learning opportunities and demonstrates a willingness to engage in challenging situations.	Seeks peer feedback to identify personal and team capability gaps. provides coaching in a supportive and constructive way to improve team performance.	Seeks feedback from peers and stakeholders to identify personal and functional capability gaps. Provides advice to team leaders to guide improvements in their area.	Creates a culture of continuous improvement, encouraging feedback from peers and stakeholders to guide professional and organisational development.
		<b>Resilient</b>	Responds to pressure by remaining calm and focussed, coping effectively with setbacks.	Demonstrates composure under pressure, and refocuses the team during setbacks	Anticipates high pressure situations and provides appropriate support to others. Demonstrate composure and effectively copes during setbacks.	Role models positive and constructive responses to high pressure situations, demonstrating composure and effective coping during setbacks.
		<b>Values Driven</b>	Understands and acts in accordance with the values and purpose of Lutheran Services aligned with the Lutheran identity and ethos.	Inspires a shared sense of team purpose and aligns team actions with the values of Lutheran Services and the Lutheran identity and ethos, by role modelling and encouraging the team to live the values.	Inspires a shared sense of purpose, role modelling and influencing others to values and ethos-aligned action. Contributes to the development of policies that recognise values and ethos-aligned actions.	Role models influential and inspiring leadership, with leadership actions that support the Lutheran identity and ethos. Champions policies that recognise actions aligned to the values and purpose of Lutheran services.
<b>Organisational Capability</b> We sustainably grow our capacity to serve through continuously improving and innovating our high-quality products and services	<b>Think Beyond Today</b> We foster a working environment that supports openness to new ideas and data-driven, holistic approaches to continuous improvement and innovation. We meet the challenges of rapid change in our sector, whilst considering, articulating and promoting our values and strategic direction in all that we do.	<b>Innovative</b>	Remains open and curious to new ideas. When faced with complex problems, demonstrates an adaptive service response that improves the outcome.	Approaches new ideas and different perspectives with curiosity and openness. Improves team effectiveness by encouraging and demonstrating innovative thinking in solving complex problems.	Promotes and demonstrates innovative thinking, implementing new ways of solving complex problems across the organisation to improve organisational efficiency.	Creates a culture of innovation, encouraging the implementation of new business processes in solving complex problems.
		<b>Strategic</b>	Considers the mission, values and objectives of the organisation in all work tasks and decision-making.	Supports the team to deliver on team goals that align with the organisational strategy. Considers and evaluates the long-term impact of decisions on team effectiveness.	Maintains a strategic perspective on operational functions, strengths, weaknesses and potential. Evaluates the long-term sustainability and impact of decisions across the organisation.	Maintains a strategic perspective on the organisation's functions, strengths, weaknesses and potential. Evaluates decisions and implements solutions based on their long-term sustainability.
		<b>Diligent</b>	Organises resources and activities into simplified processes to optimise the efficiency of workflow whilst holding client needs central.	Organises people, resources and activities into simplified processes to optimise the efficiency of the team. Identifies opportunities for streamlining of processes to maximise team efficiency.	Develops solutions to organisational issues based on a realistic analysis of their potential impact on related systems and processes. Streamlines systems and processes to achieve organisational objectives.	Demonstrates a systems perspective in dealing with the interrelating elements of the organisation. Structures the organisation to support achievement of its strategic objectives.
	<b>Make it Happen</b> We develop effective plans that follow through to successful outcomes, knowing that meeting client needs is that path to organisational success. We regularly prioritise, evaluate and update our plans to manage resources effectively and facilitate the achievement of our strategic vision.	<b>Organised</b>	Plans and prioritises to achieve individual and team objectives.	Develops effective plans and sets priorities for the team. Evaluates and regularly updates plans according to team objectives.	Develops cross-functional plans and set priorities according to the objectives of the organisation.	Develops strategic plans and sets operational priorities based on the needs of the Lutheran Services.
		<b>Resourceful</b>	Proactive in identifying the material and support necessary for the achievement of individual and team objectives, demonstrating efficient and effective use of resources.	Gathers the people, material, and support necessary for the achievement of team objectives, demonstrating efficient and effective use of resources.	Gathers the people, funding, material, and support necessary for the achievement of department objectives, demonstrating efficient and effective use of resources.	Gathers the people, funding, material, and support necessary for the achievement of organisational objectives, demonstrating efficient and effective use of resources.
		<b>Reliable</b>	Actions are consistent with words. Consistently follows-through, using appropriate processes to deliver on high-quality outcomes.	Monitors, executes and follows appropriate processes, consistently delivering high-quality outcomes.	Leads projects of strategic importance or significant impact to the organisation. Develops and promotes effective processes to ensure consistent delivery of high-quality outcomes.	Harnesses capabilities from across the organisation to consistently execute on strategic goals and objectives whilst delivering high-quality outcomes.