

Position title	Senior Servicing Administrator
Division	Customer Enablement - OPS
Department	Leveraged Operations & Support - Wealth Operations
Direct Reports	No

Our culture and values

We have a clear strategy and important work in place to become Australia's bank of choice.

Our values of **teamwork, integrity, performance, engagement, leadership** and **passion** are at the core of who we are and form the expectation of the behaviours we adopt every day.

We strive to have a culture that drives balanced outcomes; is open and informed for disciplined execution; that celebrates and recognises success; and where the sum is greater than its parts. To achieve this, we focus on four critical behaviours: **act commercially; move fast to help customers achieve their goals; recognise people for their impact; and actively challenge the status quo.**

Together, we're creating a culture we can continue to be proud of; one that will help us reach new heights.

ROLE PROFILE

Your division, your team

The objective of the Customer Enablement Division is to provide frontline relationship support and service and develop strong and sustainable partnerships to a wide range of customers and partners.

The Operations, Processing & Servicing (OPS) function contributes towards this vision by developing and executing strategies which will deliver our products and services to our customers in an efficient and cost-effective manner. A culture of operational excellence underpins this, with the delivery of a highly efficient and robust operational platform impacting the experience of our customers and partners, which in turns delivers to the customer value proposition.

Leveraged Operations & Support is focussed on delivering efficient and effective processing services for our Key Partners and Customers. Operating the highly regarded Leveraged brand for our Partners we command a market leading industry position. We aim to be the most trusted provider of Wealth Financing solutions to the Advised market of Australia and seek to build sustainable integrated relationships with Partners who are connected and trusted by the Customer.

The purpose of your role

Reporting to the Manager, the Senior Servicing role is part of the Leveraged Operations & Support function. The key purpose of the role is to provide excellent service to clients both internal and external, and partners in all aspects of the end-to-end process of Servicing. Responsibilities and attributes include:

- Ability to identify and apply the Banks Margin Lending Business Rules when providing assistance in the capacity of a subject matter expert (SME) for Servicing Opportunities and Operational capabilities
- Oversee and support the team to ensure the timely processing of all requests whilst adhering to CHESS and the Bank's Margin Lending policies and procedures

Meeting these requirements will deliver an excellent service to our partners and enhance the overall customer experience.

Your core relationships

This position reports to the Manager and has no direct reports.

The key relationships include Leveraged Operations & Support, Customer & Partner Engagement, Customer Care & Governance, and External Stakeholders.

What you're accountable for

Processing Efficiency	<ul style="list-style-type: none"> • Complete all assigned projects within the agreed time frame whilst communicating any obstacles that may delay the delivery date to the Team Manager. • Oversee the Servicing team to ensure all tasks are completed within the agreed services levels. • Be proactive with suggestions to improve the efficiency of the team/business and maximise staff productivity through effective work practices and identification and implementation of key change. • Train new staff the Servicing team processes and continually educate the team by providing guidance and training. • Provide Subject Matter Expertise for the Servicing Department and internal clients.
Processing Quality & Innovation	<ul style="list-style-type: none"> • Maintain knowledge of all products and procedures relevant to department • Attend at all recommended/applicable training sessions. • Compliant with Bendigo and Adelaide Bank Margin Lending Credit Policy at all times. • Manage periodic reporting. • Maintain the subsequent Service Level Agreement spreadsheets. • Constructively challenge the status quo to seek to improve processes, and discuss with Manager any potential improvements, that assist to either streamline processes or help mitigate against possible future operational risk events.
Customer, Partner & Advisor	<ul style="list-style-type: none"> • Provide assistance and high level of service to both customers and Bank staff. Customer and staff satisfaction achieved, in line with Bank's service standards with no justifiable customer complaints received. • Liaise positively with clients and advisers when a query has been escalated by both the Servicing administrators. • Demonstrate problem solving skills by generating creative solutions where necessary to meet client's needs. • Escalate recommendations as appropriate to Team Leader and assist in the analysis and implementation of new change initiatives. <p><i>Service Levels</i></p> <ul style="list-style-type: none"> • Provide a versatile and positive approach to ensure applications are prioritised and approved each day. • Assess workflow within the area and offer assistance to co-workers where possible. • Ensure all tasks are completed within department Service Level Agreements
Leadership & People	<ul style="list-style-type: none"> • Engage in learning and development opportunities required to fulfil both business and personal growth. • Actively seek to develop and maintain market industry knowledge. • Demonstrate self-awareness of development needs and employ appropriate strategies to address. • Proactively contribute at team meetings. • Build strong working relationships across the Operations team and business.

Risk & Compliance	<ul style="list-style-type: none"> • Ensure your work practices are conducted in accordance with all Bank. • Risk management and compliance requirements, as specified in Bank policy, corporate and business unit procedures and the staff handbook. • Report instances of risk or non-compliance to your manager and/or appropriate designated contact as soon as they are identified.
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Your knowledge, skills and experience

Knowledge & Skills	<ul style="list-style-type: none"> • Communicates effectively and builds relationships with internal and external clients by listening with empathy, asking questions, ascertaining needs and exceeding expectations. • Displays a friendly and confident approach with people. • Is proactive, positive and maintains composure under pressure. • Handles customer challenges using conflict resolution skills. • Developed communication skills • Developed time management skills, including being organised, able to prioritise work and able to meet deadlines. • Maintains highly accurate approach with constant attention to detail. • Thorough knowledge of and adherence to policies and procedures pertinent to role. • High level of computer literacy. • Highly developed numerical skills • Displays positive team attitude and willingness to help whenever possible. • Effective two-way communicator, keeping others informed and asking questions to understand team members' needs. • Is fair in dealing with others, such that actions build trust. • Accepts others' differences and handles conflict well. • Displays initiative and drive to learn and continually improve. • Has a strong learning orientation and quickly grasps new concepts. • Has self awareness of personal strengths and weaknesses and develops strategies to improve on weaknesses.
Relevant Experience	<ul style="list-style-type: none"> • Demonstrated business experience gained within the Banking and Finance industry (preferred) • Experience with CHES procedures (desirable) • Experience in accounts administration and customer service (essential) • Intermediate knowledge of Microsoft Office, Excel, Word and Outlook

Your qualifications and certifications

Secondary Education
 Basic understanding of the financial markets
 Studies in Securities, Banking, Finance, Business, Economics or related discipline will be an advantage.

Risk responsibility

Ensure all work practices are conducted in accordance with all Bank compliance requirements, as specified in Bank policy, corporate and business unit procedures and identify and report instances of non-compliance to appropriately.

CAPABILITY PROFILE

Key people capabilities

Relationships	Role Expertise
Execution	Customer Focus

People capability profile

<p>Relationships</p> <p>Builds and maintains productive relationships with trust and integrity. Works collaboratively and is open to the perspectives of others.</p>	<p>Results Focus</p> <p>Sets and manages relevant goals. Is mindful of and responds to the business environment. Asks for help and reviews for learning.</p>	<p>Grow Self</p> <p>Grows knowledge, is curious and proactively applies learning. Builds resilience and is mindful of impact on others.</p>	<p>Role Expertise</p> <p>Maintains role-specific standards and applies knowledge, skills and experience on-the-job.</p>
Advanced	Advanced	Intermediate	Advanced
<p>Communication</p> <p>Effectively expresses thoughts, ideas and information. Actively listens and adapts communication style. Engages, influences and connects to our purpose to tell our story.</p>	<p>Execution</p> <p>Makes well-considered decisions, plans and delivers quality outcomes. Problem solves and acts with integrity. Holds self and others accountable.</p>	<p>Grow Others</p> <p>Develops others by sharing feedback, recognising and celebrating outcomes. Connects with others to guide, empower and inspire.</p>	<p>Customer Focus</p> <p>Identifies customer goals, makes relevant recommendations and takes appropriate timely action. Collaborates across the business to deliver best outcomes for the customer.</p>
Advanced	Advanced	Intermediate	Advanced
<p>Partnering</p> <p>Acts with intent to build sustainable partnerships with customers, community and stakeholders to deliver shared value and achieve business outcomes.</p>	<p>Innovation</p> <p>Constructively challenges the status quo and offers alternatives. Seeks to improve ways of working and is open to new ideas and experiences.</p>	<p>Future Ready</p> <p>Exchanges and respectfully challenges perspectives and approaches. Anticipates, embraces and promotes change to achieve our vision for today and tomorrow.</p>	<p>Commerciality</p> <p>Applies understanding of finance, risk, people and customer for decision-making to deliver business sustainability. Takes appropriate risks and acts in the best interest of the Bank.</p>
Intermediate	Intermediate	Intermediate	Intermediate

Role motivators

Expertise	Being recognised for specialist knowledge; providing specialist advice.
Impact	Directly contributing to the success of the organisation, knowing work directly affects productivity and profit.
Pressure	Working under time pressure and demanding deadlines.