**Role Purpose Statement**

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| **Position Title** | **Snr Consultant – Workflow Business & Process Improvement Lead (Private Wealth)** |
| **Position Address** | 395 Bourke Street Melbourne |
| **Organisational unit** | Private Wealth Client Support |
| **Report to** | HO Private Wealth Transformation |
| **Group (1 to 4)** | Group 4  |
| **Purpose** | The NAB Private Wealth business brings together holistic solutions across both sides of the balance sheet, supported by our private bankers, our leading JBW advisor offering and self-directed offering (nabtrade and nab Equity Lending) - this gives NAB an ability to service a client “360 degrees” (“whole of balance-sheet”) with clear market differentiation.* You can define your own career path
* Be rewarded and recognised for the value you bring in Operational Excellence
* Bring your experience as a Lean Six Sigma Black Belt to this exciting role

As a **Workflow Business & Process Improvement Lead (Private Welath)** you will leverage your Workflow, Customer Journey and Business Improvement background to develop and executive strategies and plans, to implement innovative solutions that improve the effectiveness of our E2E business processes and operations. This role is critical to our simplification journey and will help spearhead change across Private Wealth.The role will lead E2E workflow/ process/ customer journeys and will engage, collaborate and influence stakeholders and derive, agree and deliver on a set of target recommendations. The role will lead workflow implementation and optimisation across the business and deliver complex business transformation improvements to transition customer and business experiences to desired future states, as well as driving operating model maturity, process uplift and transformation that will deliver end-to-end business outcomes.You are a self starter, who will bring passion, hunger and enthusiasm for the customer and business improvement and thrive in high paced complex environments.  |
| **Working Relationships** | * Executives and leadership teams
* Private Wealth colleagues
* B&PB Business Units
* Enterprise change team
* Product Owners
* Strategy, Data and Digital Business Units
* Risk Partners
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| **Responsibilities** | * Product Ownership of the PEGA workflow design and implementation activities across Private Wealth Client Services
* Play a critical role in engaging and communicating the workflow vision, roadmap, goals, plans and expectations
* Leading and delivering customer journey / process re-engineering / business improvement initiatives that drive quantifiable outcomes.
* Performing diagnostics across complex E2E business processes and operations, including current state (e.g. pain points, challenges, inefficiencies, etc) and deriving future state recommendations (e.g. process re-engineering, operating model changes, digitisation, automation, workflow, etc.)
* Defining / Reviewing / Improving the end-to-end customer journeys / processes and associated workflow changes in order to make a step change in our performance.
* Defining business requirements to support workflow and automation. Work with the other members of the squad to elaborate features and stories, defining acceptance criteria and definition of done
* Engaging and influencing snr stakeholders across the business and eliciting the support required to deliver on the target customer journey/ process (e.g., systems improvement, resources, etc.).
* Balancing customer, operational, commercial, strategic, risk and regulatory factors when making recommendations to improve processes
* Collaborating closely with senior management to align improvement projects with organizational and divisional strategy and roadmap
* Supporting and uplift capability through coaching, training participation and/or mentorship
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| **Skills and Experience required** | * Proven PEGA workflow design and implementation experience on multiple engagements
* 6+ years of relevant working experience – including experience in financial services (preferably investment banking & wealth), working in operations business improvement / transformation environments or consulting roles.
* Exceptional understanding of business process standards and methods, with a qualification in Lean Six Sigma Black Belt (preferred) or equivalent preferred.
* Leading and influencing E2E process change across business areas and driving strategic process improvements.
* Exceptional process design and customer journey experience
* Proven ability to formulate ideas and present business cases effectively.
* Experience in leading programs of work to deliver business and technology improvements
* Excellent written and verbal communication and presentation skills, and the ability to construct and deliver material appropriate to the audience and situation.
* Ability to build strong relationships and influence senior stakeholders.
* Initiative, resourcefulness and a willingness to be hand on, take ownership and deliver great outcomes.
* Proven experience working with agile methodologies as well as human centred design techniques
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| **Qualifications requirements**  | * Tertiary and/or post-graduate qualifications relevant to required capabilities.
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| **Enterprise Behaviours**  | Responsible for behaving in accordance with NAB's Code of Conduct and demonstrating the Enterprise Behaviours in all client, community and employee interactions. Protecting NAB information and information systems is the responsibility of every employee. For your specific responsibilities refer to Use of Information and Information Systems - User Responsibilities within the Group Information Security Standards. |