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| **Position title** | **Document Management Support Lead** |
| **Division** | Customer Enablement |
| **Department** | Systems and Document Management |
| **Direct Reports** | No |

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| **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. |

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| **ROLE PROFILE** |

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| **Your division, your team** |
| **Systems and Document Management**  As part of the Customer Enablement Division, the Systems and Document Management team is responsible for:   * Support, development, and change management of the Retail Branch Systems * Support, development, and change management of the Retail Lending Systems * Management of Core Banking system and control tables * Support, development, and change management of the Customer Correspondence system across the BEN group. * Management of external Customer Correspondence (both letters and statements) across the BEN group. * Support, development, and change management of the Documents Management System * Support, development, and change management of the Records Management System * Managing customer documents and records across the BEN group, including retention, disposal and full lifecycle management. |

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| **The purpose of your role** |
| The Document Management Support Lead is responsible for the support of BEN’s Electronic Document Management System, development of BEN’s forms, BEN’s Customer Communications platform and BEN’s Knowledge management system.  Key Responsibilities:   * Support the Groups electronic document management system. * Provide additional support to the Banks’ Records Manager and records management system. * Develop the Groups forms, adhering to style guides and compliance obligations. * Support the Groups knowledge management system. * Support the Customer Communications platform, including development on new Communications delivery alternatives. * Develop new processes and procedures to move paper-based documents into the electronic documents management system. |

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| **Your core relationships** |
| This role will deal with a wide group of key stakeholders across the BEN group, including Rural Bank and Adelaide Bank.  The role will require engagement with all leadership levels of:  o Consumer Banking  o Business Banking  o Wealth  o Technology & Transformation  o Internal and External Audit  o Group Risk  o Group Legal  o Group Regulatory Compliance  o Regulatory Bodies  o External technology vendors |

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| **What you’re accountable for** | |
| **System Support** | Provide second level system support for iCentral, SmartComms, LRS, Forms Index, DocShare and EncompasS.  Develop test scripts and execution of PVT, DR & SR testing as required.  Identify and resolve issues in a timely manner.  Design and delivery of forms and workflows for all areas of the group |
| **Forms Development** | Design and delivery of forms and workflows for all areas of the group.  Understand and investigate new technologies, where appropriate, around forms development and delivery. |
| **Project Management** | Required to provide SME support on assigned projects representing the Customer Enablement Division  Work with key stakeholders to deliver key milestones and defined projects |
| **Change Management** | Define Business Requirements, complete and review required documentation and engage key stakeholders for system changes.  Work with appropriate areas to write communications for new initiatives and changes.  Understand the change management process, including training of end users and ongoing support processes. |
| **Analytics and documentation** | Investigate system issues.  Analysis and documentation of business processes to identify issues and solutions.  Documenting business cases to improve current Group systems. |

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| **Your knowledge, skills and experience** | |
| **Knowledge & skills** | * Excellent interpersonal and communication skills (written & verbal). * Ability to provide training or awareness to users. * Ability to relate to the needs of team members and key stakeholders. * Ability to make sound reasoned decisions. * Knowledge of Microsoft O365 applications including SharePoint * Knowledge of Bendigo Bank systems including iCentral, SmartComms, DocShare, and Forms Library, EncompaaS. * Knowledge of current business policies, processes & procedures. * Understanding of document management technologies and form design tools. * Programming skills including Visual Basics (VBA), JavaScript and MS word (Text). * Ability to challenge current processes and identify effective and efficient solutions. * Exposure to BPM (Appian) platform |
| **Relevant experience** | * Experience in Programming is desirable. * Understanding of key IT development principles and methodologies * A degree in an IT or related discipline desirable, but not essential |

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| **Your qualifications and certifications** |
| An IT or relevant degree or qualification desirable, but not essential |

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| **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. |

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| **CAPABILITY PROFILE** |

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| **Key people capabilities** | |
| **Develop BEN forms** | **Support Customer Communication System** |
| **Support Knowledge Management System** | **Support and grow the Document Management System** |

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

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| **Role motivators** | |
| **Motivator** | Ensure compliance of BEN group forms |
| **Motivator** | Develop new processes and procedures for electronic document storage |
| **Motivator** | Ongoing support of Key group systems |