

**POSITION DESCRIPTION – TEAM LEADER**

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| Position Title | Customer Experience Insights Lead | Department | Engagement & Support |
| Location | Sydney | Direct/Indirect Reports | Nil |
| Reports to | Head of Customer Experience | Date Revised | 12/05/21 |
| Industrial  Instrument | Social Home Care and Disability Services Award | | |
| Job Grade | Job Grade 5 | | |

**Position Summary**

The **Customer Experience Insights Lead** is responsible for leading the development of actionable customer insights across the E&S program in alignment with team and organizational priorities. Through primary and desktop research, they will look for opportunities to: acquire, convert, retain and up-sell Red Cross supporters, and improve the experience of, and increase engagement for, all Red Cross customers. This includes analysis of market opportunities, the profiling of prospects and research aimed at maximising the effectiveness of donor acquisition and loyalty campaigns, and leading data driven analysis of products and processes, with a customer-focused lens.

This role is accountable for the management of our CX measurement and satisfaction surveying programs, including the delivery of annual, recurring and standalone customer surveys. The role will also take a lead in the continuous improvement of our customer segmentation to support, in particular, targeting and opportunity identification for the fundraising, marketing and MDP areas of the business.

The role will also development customer listening solutions, feedback mechanisms, insight reporting and manage our CX external partner relationships.

**Position Responsibilities**

**Key Responsibilities**

* Proactively undertake market and competitor reviews and analysis, providing actionable insights that help develop Red Cross positioning, product / service propositions and marketing activities
* Work as a business partner with Supporter Acquisition / Loyalty, MarComms and Major Donor Partnership teams, representing the customer, leading research to segment the market, identify new market opportunities, potential partnerships for Red Cross, and uncovering opportunities for continuous improvement or new product innovation.
* Identify and profile key prospects (such as high net worth individuals, donors and corporates) and identify high level alignment opportunities between prospect interests and Red Cross areas of need.
* Lead the design, delivery and reporting of customer experience surveying and satisfaction / measurement programs across different products, campaigns and customer types.

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* Support the business in completing screenings of potential business partners and ambassadors and assessment of any other partnerships that pose a reputational risk by a public image or association.
* Manage the supplier relationships and drive greater value from our external partners, including existing Qualtrics and RDA relationships.

**Position Selection Criteria**

**Technical Competencies**

* Strong qualitative and quantitative research competencies, including survey / research design and analysis / reporting
* Strong capability in developing data-driven insights, working with complex data sets across multiple sources. Experience working with both numeric and verbatim data
* Knowledge of effective survey design and experience working with online survey platforms (esp. Qualtrics), Excel & PowerPoint. Experience working in SPSS / SQL, BI Reporting Tools would be valued.
* Experience in developing and working with customer segmentation, propensity modelling and customer personas / journeys
* Competence in one or more customer experience / design methodologies, such as UX, service design, Human Centred Design
* Strong self-motivation and the ability to prioritise across multiple activities / deliverables
* Strong communication, collaboration, stakeholder management and influencing skills
* Experience working agile or using lean six sigma tools and processes would be highly regarded.

**Desirable**

* Sales or fundraising background
* Experience managing corporate / customer relationships
* Interest in humanitarian issues
* Basic understanding of fundraising practices and donor motivations

**Qualifications/Licenses**

* Relevant qualifications in Marketing, Research, Insights, Business or related discipline
* Minimum 2 years’ experience in research, customer experience or insights delivery in a similar role.

**Behavioural Capabilities**

* **Personal effectiveness | Solving problems |** Demonstrated ability to use data, knowledge and experience to identify problems potentially impacting teams or programs and proactively develop and implement effective solutions.
* **THINK | Investigate, Analyse and Make Decisions |** Seeks information and analyses evidence and data to make decisions; Asks the right questions to get information **| Checks data for relevancy, accuracy and completeness |** Gathers data to diagnose a problem | Makes evidence-based

decisions

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* **Team effectiveness | Communicating |** Demonstrated capability to communicate clearly and concisely ensuring messages are understood by all within the team using a range of communication techniques. Ability to express ideas clearly, listen effectively and provide feedback constructively.
* **Organisational effectiveness | Thinking strategically |** Demonstrated understanding of key drivers of success within teams to enable achievement of organisational goals. Ability to think and plan goals in the long term as well as the present.
* **Organisational effectiveness | Innovating and improving |** Demonstrated capability to lead continuous improvement activities and encourage team members to identify ineffective processes and contribute to new ideas and ways of working.
* **Collaborate | Teamwork and Collaboration |** Works with others to achieve shared goals; Collaborates with team members to achieve shared outcomes | Actively participates in team decision making | Contributes to team outcomes | Demonstrates an understanding of the links between personal goals, team goals and organisational goals | Consistently participates in team building activities | Demonstrates effective team behaviours such as respect, integrity, honesty, trust and support
* **Collaborate | Engage and Influence others |** Demonstrates appropriate engaging and influencing skills aligned with Red Cross objectives; Establishes contact with others in response to specific needs | Builds relationships with external parties as required | Presents a point of view in a constructive and objective manner | Makes a strong positive personal impression on others
* **Achieve | Plan and Implement |** Effectively scopes, plans and implement work activities Clarifies individual work expectations and objectives | Understands the relationship between various work activities | Understands basic project management methodology | Effectively plans, implements and monitors own work plan | effectively manages own time

**General Conditions**

All Red Cross staff and volunteers are required to:

* Adhere to the 7 fundamental principles of Red Cross:

**Humanity | Impartiality | Neutrality | Independence | Voluntary Service | Unity | Universality**

* Act at all times in accordance with the Code of Conduct
* Comply with the Work Health and Safety management system
* Undertake a police check prior to commencement and every 3 years thereafter
* Support a child safe organisation by undertaking screening for suitability to work with children, youth and vulnerable people and to comply with relevant state/territory legislative requirements
* Assist the organisation on occasion, in times of national, state or local emergencies or major disaster

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