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| **Position title** | **Wealth Sales Activation Lead** |
| **Division** | Sandhurst Trustees |
| **Department** | Wealth Distribution |
| **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** |
| Wealth is part of the Consumer division of the group. It offers a range of products and services to our Retail business, external partners and customers and increasingly via digital channels. These products and solutions include Superannuation Investment solutions; Life Insurance – (Group and Retail) Wholesale cash solutions and Commercial Loans. The Wealth Distribution team is part of Sandhurst Trustees and is responsible for driving growth into our superannuation and managed fund solutions via our internal and external distribution channels.  |

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| **The purpose of your role** |
| The Wealth Sales Activation Lead is responsible for bringing to life and ensuring the consistency in the presentation of the partner and customer value proposition for Wealth.This role is accountable for defining and coordinating Wealth customer and partner engagement activities and driving our value proposition through various marketing and sales initiatives including the fulfilment of written communication. The function will have oversight and support of Group Marketing resources. The Wealth Sales Activation Lead is a member of the Wealth Distribution team and works collaboratively with the Business Development Mangers who are responsible for driving growth via external adviser distribution channels and the Wealth Engagement Managers who are responsible for driving growth via our retail distribution channels.  |

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| **Your core relationships** |
| The role will report to: Senior Manager Wealth DistributionThe role will be a member of the Wealth Distribution team.Sandhurst Leadership teamSandhurst Customer and Communications teamWealth ProductsInternal Marketing teamExternal Marketing providersReporting and Analytics  |

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| **What you’re accountable for** |
| **Strategic Development** | * Drive and influence cross team collaboration particularly with distribution channels and other stakeholders to determine, develop and deliver aligned partner and customer messaging.
* Contribute to the leadership, development, execution & communication of the wealth business strategies.
* Work closely with the Wealth Distribution team and Wealth business on strategy aligning our communication with our target and growth expectations.
* Challenge the business to align focus areas to the business vision and goals.
* Work with insights data to identify market opportunities, developing a planned approach to engagement with existing customer base.
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| **Marketing and Communication** | * Develop a 12-month sales/marketing plan to streamline business practices more efficiently. Inclusive of being able to measure our approach/focus.
* To align our key messages with our value proposition and our ultimate goal for Wealth solutions to be seen as core bank offerings within the Bank.
* Collect, summarise and present market intelligence in relation to brand and marketing.
* Prepare sales assets to be utilised by the Business Development Managers as required.
* Develop strategies and campaigns to reengage non active customers.
* Organise the production of marketing collateral through Group Marketing.
* Build a planned consistent approach for events e.g. Conferences and Professional development days for our distribution channels.
* Preparation of marketing material for Branch use and customer communications.
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| **Customer & Partner** | * Build, maintain and enhance strong and broad collaborative relationships with internal and external stakeholders that raise awareness of Wealth.
* Drive effective two-way communication with stakeholders ensuring regular and targeted updates of initiatives are provided with regular stakeholder feedback sought.
* Develop and drive mechanisms that capture relevant customer and partner feedback and provide customer trend and competitor analysis and use this information to promote customer connectedness and ease of doing business.
* Use existing relationships, networks and knowledge of the industry to identify new markets, business trends and opportunities.
* Understand customer and stakeholder objectives and drive high quality outcomes.
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| **Financial and Business Performance** | * Monitor and evaluate Wealth marketing and campaign activities and initiatives.
* Oversee outcome and analytic reporting on partner and customer value proposition initiatives to aid business learnings.
* Build promotional/awareness activities for use internally to increase branch awareness throughout the business as well as external activities to drive performance focus.
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| **Your knowledge, skills and experience** |
| **Knowledge & skills** | * Extensive knowledge and experience of wealth and /or banking products, marketing and communications and distribution strategies advantageous.
* Strong understanding of core marketing concepts and a general understanding of sales strategies.
* Understanding of contemporary best practice in Sales/Marketing is highly advantageous
* Results focused, self-starter
* Ability to develop and execute strategy at senior levels
* Advanced influencing, negotiating and communication in cross-functional environments
* Verbal and written communication skills attuned to the needs of the audience
* Understands the value of, and can work collaboratively to achieve, results
* Ability to drive a successful marketing/communications and sales team
* Flexible style with the ability to prioritise in line with current and relevant business needs
* Ability to link strategic objectives to goals, responsibilities and operational aspects of the role
* Strong presentation skills, including the ability to make formal presentations both to internal stakeholders and external partners.
* Proven problem solving and conflict resolution skills.
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| **Relevant experience** | * Experience working in a marketing/sales function delivering positive business outcomes.
* Track record of delivering successful Sales Activation/Marketing campaigns to chosen markets.
* Proven ability to influence positive outcomes and collaborate effectively with peers.
* Proven business and leadership experience gained within Banking, Finance or other professional services environment.
* Proven experience in wealth management role.
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| **Your qualifications and certifications** |
| * Tertiary qualification in Business, Marketing or related discipline.
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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** |
| **Relationships**  | **Role Expertise** |
| **Customer Focus** | **Results Focus**  |

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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. |
| **Advanced** | **Advanced** | **Intermediate** | **Advanced** |
| **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. |
| **Intermediate** | **Advanced** | **Intermediate** | **Advanced** |
| **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. |
| **Intermediate** | **Intermediate** | **Intermediate** | **Intermediate** |

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| **Role motivators** |
| **Motivator** | Insert motivator definition. |
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| A close up of a logo  Description automatically generated**BANKING EXECUTIVE ACCOUNTABILITY REGIME** |

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| **BEAR accountability statement** |
| The **Executive Position Title** has been registered as an Accountable Person under the Banking Executive Accountability Regime (BEAR). The aspects of the Bank’s operations for which the **Executive Position Title** has actual or effective responsibility for management and/or control have been documented and provided to APRA in an Accountability Statement. The **Position Title** is accountable for the following items from the **Executive Position Title’s** Accountability Statement: |
| **Individual Key Accountabilities** |
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| **Joint Accountabilities as part of the Division Leadership team** |
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