

Head of Client Services (1.0FTE)

Job Description

This job description describes the tasks that will be required of the job holder but does not form a part of the job holder's Employment Agreement. This Job Description is likely to change from time to time, to ensure that the role continues to best serve CAP's Mission. Therefore, flexibility on the part of the job holder is required.

Location of the Role

CAP Head office, Penrose, Auckland

Purpose of the Role

- 1) To lead the team, which works primarily with, and understands the needs of, debt help clients.
- 2) To provide strategic oversight and management of all Client Services operations to ensure that CAP continues to serve our debt help clients with excellence.

Key Relationships

Department:	Services Department - Client Services Team
Direct Manager:	Services Director
Direct Reports (4):	New Clients Team Leader Client Support Team Leader Debt Solutions Team Leader Client Rights Advocate
Primary stakeholders:	Clients Creditors
Key Internal Relationships:	The wider Services Department Communications & Marketing Teams External Engagement Team
Key External Relationships:	Debt Coaches – maintain open lines of communication to ensure that the client services processes are effective. Insolvency and Trustee Service Government/industry/sector Grow effective relationships with departments such as the Insolvency and Trustee Service, MSD, Dispute Resolution schemes, Commerce Commission, and other Debt Solutions Providers or Financial Mentors to assist in achieving better outcomes for clients.

Summary of Role Accountabilities

- 1) Monitor and facilitate technical outputs and accuracy of the teams within Client Services, including holding the post of Complaints Officer.
- 2) Build effective relationships to enable better outcomes for clients.
- 3) Lead and manage all direct reports, and facilitate their development.
- 4) Lead and enable innovations and improvements to the work of the Client Services Team.
- 5) Participate in organisation-wide activities.

Role Accountabilities on a day-to-day level

1) Monitor and facilitate technical outputs and accuracy of the teams within Client Services, including holding the post of Complaints Officer.

Pertaining to Output:

- Develops, tracks and reports on results and overall service effectiveness
- Continue to monitor workflows between the New Clients, Client Support and Debt Solutions Teams, and adjust as needed
- Encourage cross team interaction and healthy levels of conflict.
- Empower Team Leaders to make firm and compassionate decisions regarding clients situations.
- Support the team in resolving the most complex client issues.

Pertaining to Accuracy:

- Oversee staff training and standard of excellence in casework.
- Complete accurate KPI tracking across multiple fields and completion of the dashboard.
- Ensure client or creditor complaints are handled and recorded appropriately.

Pertaining to Admin and Reporting:

- Oversight of all reporting being compiled for the teams.
- Manage the Client Services budget.
- Record success indicators for clients journeys and celebrate!

Pertaining to the post of Complaints Officer:

- Ensure client or creditor complaints are handles and recorded appropriately.
- Ensure Client Services, Frontline Coach training and wider CAP staff familiarisation with CAP Complaints Policy and Procedures.
- Oversee complaints handling to ensure appropriate quality and urgency of responses and act as the escalation point for unresolved Debt Help complaints.
- Ensure the Complaints register is accurately and promptly maintained and periodically reviewed to ensure learnings are utilised to improve CAP's operating practices.

Performance Indicators or Measurable Outputs could include:

- KPIs relating to service delivery and effectiveness, including clients booked, budgets completed, transfers to Client Support, Debt Free clients, client outcomes resulting from advocacy work and positive closures
- KPIs relating to client wait times, such as budget delivery dates or complaints resolution
- Measurable competency, skill and qualification uplifts across the Client Services teams

2) Build effective relationships to enable better outcomes for clients.

- Ensure healthy relationships with external stakeholders, such as MSD, The Insolvency Service, FinCap, Debt Solutions Providers, and Dispute resolutions scheme providers are maintained.
- Seek to establish new relationship opportunities and look for ways to enhance the level of service CAP can extend to clients.
- Build and maintain strong relationships with Frontline staff, to enable a streamlined and consistent approach with clients.
- Ensure teams have strong relationships with clients, including timely and effective communication, and conduct regular reviews on cases to ensure clients are receiving the right advice and are on track toward positive outcomes.
- Ensure Client Services teams build and maintain relationships with clients' creditors to enable smooth negotiation over client debt.

Performance Indicators or Measurable Outputs could include:

- The number and health of external relationships and opportunities
- Health check indicators for internal relationships, including coach and client engagement surveys
- Client outcomes resulting from external relationships, such as money saved

3) Lead and manage all direct reports and facilitate their development.

- Empower Team Leaders to make firm and compassionate decisions regarding clients situations.
- Build a healthy culture within the Client Services Team, in keeping with the overall CAP organisational identity, values, culture and mission.
- Support and enable direct reports to achieve the work, including setting and achieving team-level progress goals, and holding regular meetings to enable the work.
- Support and enable direct reports to grow in their cultural capability with regard Maori and Pasifika, so as to better service and understand clients.
- Regularly review the performance of direct reports, and adjust their job descriptions as needed.
- Facilitate and encourage opportunities to expand direct reports' thinking and skills, as well as opportunities to be the face of CAP. i.e. in areas of Te Reo, FinCap Hui, ITS interactions, and off-site creditor visits.
- Develop direct reports project management capabilities by initiating projects in their area of expertise, natural strength, and passion.
- Commit to utilising CAP's training budget to enable further development in leadership and management.
- When needed, manage the performance, and/or facilitate the care of, direct reports in consultation with the Head of HR.
- Recruit and induct new staff as necessary to ensure that the Client Services Team is effectively and efficiently staffed

Performance Indicators or Measurable Outputs could include:

- The Client Services Team is clear and agreed on their purpose of delivering an excellent debt counselling service to all clients.
- Staffing needs of the team in relation to workload are anticipated and planned for.
- Direct reports consistently deliver on their work towards team purpose.
- Direct reports are engaged with CAP, and participate in the organisational culture.
- Direct reports are growing in their ability to perform professionally.

4) Lead and enable innovations and improvements to the work of the Client Support Team.

- Contribute with other Heads from the Services Department, to design and improve end-to-end service offering.
- Working with the other Heads from the Services Department, evaluate CAP's service to make sure service delivery practices are continually fit for purpose and effective – in line with CAP's strategic direction.
- Work with your Team Leaders to take risks and try new things that will help enable CAP to become an industry leader in client care, debt solutions, and financial empowerment.
- As CAP moves forward with the bi-cultural journey, continue to innovate in areas of communication and service delivery.
- Encourage cross team interaction and healthy levels of conflict.
- Look for areas to grow resilience and wellbeing support among the Client Services teams as they engage vulnerable and high-need clients.

Performance Indicators or Measurable Outputs could include:

- Evaluation practices are prioritised and embedded in the team.
- New approaches are tested in integrated into BAU
- Annual Plans reflect the priorities of CAP's strategic direction and stakeholder-centric service delivery

5) Participate in organisation-wide activities.

Pertaining to Organisational Identity & Culture:

- Participate in daily and weekly prayer meetings with colleagues for the work of CAP and it's clients.
- Attend, and sometimes present at, conferences and away days to learn and grow in the work together with colleagues.
- Participate in Te Ao Māori learning and development opportunities, including within CAP, and lead the client services team to do likewise.

Pertaining to Donor Relations:

- Regularly invite personal contacts to contribute to CAP's 'Life Changer' regular giving program and participate in office activities to this end, including an annual thankyou calling evening.
- Help out with 3-4 CAP Church Talks per year around Aotearoa, either by supporting or doing the talk.

Performance Indicators or Measurable Outputs could include:

- Consistently participates in all of the above listed activities

Authorities

- Leave/sick/flexi approval for direct reports within annual entitlement.
- Allocation of work to direct reports, within the scope of their roles.
- All HR management of direct reports
- Authority to spend within the Client Services budget
- One of the approvers of Client Smile Fund / Client Aid applications.

Requirements of the Role

Personal attributes & values

- A strong personal alignment with the foundational Christian philosophy, organisational identity, culture, and values of CAP.
- Ability to work well and professionally and to lead others to do the same.
- Ability to work with many different faith expressions, where-ever they are on the spectrum of conservative to charismatic.
- Ability to work and lead comfortably and well in an NFP organisation that seeks to honour Te Tiriti o Waitangi in the way work is done.
- Ability to work comfortably and well in an environment which demonstrates the Christian gospel with stakeholders, shares about Jesus Christ as appropriate, and prays.
- Ability to balance empathy, compassion, professionalism and best practice, and to lead others to do the same.
- Ability to work under time pressure, and a willingness to – when the work requires it - flexibly to work evenings, and weekends.
- A personally held strong quality improvement ethic, and the ability to cultivate this in others

Skills, knowledge, expertise & experience

- A strong growth, developmental and learning mindset, and mode of practice.
- Proven ability to lead a team, including leading leaders, to increased purpose and work delivery, and through change initiatives.
- Able to notice improvement opportunities in existing processes and initiate projects or improvements.
- Strong time management with a capacity for large workloads, and an attitude of completion.
- Strong skills in working collaboratively, drawing on the insights, wisdom, and skills of colleagues to create a shared service delivery plan
- Excellent oral, written and interpersonal communication skills.
- Strong experience working in client-centred service delivery
- Familiarity with the Building Financial Capability & Debt Solutions sectors, including standards and practices
- Familiarity with financial institutions, systems and practices in Aotearoa
- Understanding of the power of technology for innovation and a desire to leverage this for the organisation.
- Proven ability to question assumptions and status quo, and providing evidence-based reasons for change.

Education

- Tertiary level qualification or industry qualification in relevant area

Job description prepared by: Abbey Peters **Last Updated:** September 2022

Statement of Acceptance

The Employee will perform the duties set out in this Job Description. These duties may be modified and updated by the Employer from time to time following consultation with the Employee. The Employee also agrees to perform all other reasonable duties and comply with reasonable instructions issued by the Employer.

I confirm that I have read and understand this Job Description, and agree to abide by the duties, tasks and accountabilities within it.

Signature:

Date:

Name: