

# New Clients Team Leader

1.0 FTE

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 that manages the first months of a client's journey with CAP.
- 2) To provide management of all New Clients operations to ensure that CAP continues to serve our debt help clients with excellence.

## Key Relationships

Department: Client Services, Services Department

Reports to: Head of Client Services

Direct Reports: New Clients Coordinators  
Budget Solutions Advisors  
Client Services Specialists

Key Internal Relationships: Client Services Team Leads  
  
Frontline Coaches  
Regional Managers  
Client Rights Advocate  
Services Department Leaders  
Communication & Marketing Team  
External Engagement Team

Key External Relationships: Clients  
Sector organisations

## Summary of Role Accountabilities

- 1) Monitor and facilitate technical outputs and accuracy of the New Clients Team
- 2) Build effective relationships to enable better outcomes for clients.
- 3) Lead and manage all direct reports, and facilitate their development.
- 4) Contribute to and enable innovations and improvements to the work of the New Clients Team
- 5) Participate in organisation-wide activities.

## Role Accountabilities on a day-to-day level

### 1. Monitor and facilitate technical outputs and accuracy for the New Clients Team

- Oversee the New Clients phone lines, emails, website and GRACE System to meet targets for calls answered and messages responded to.
- Manage a roster for team tasks and adjust as required to meet work targets.
- Optimise processes in the team to provide excellent service to potential new clients in the most efficient way possible.
- Oversee the preparation of bespoke financial statements (budgets) to ensure that these are delivered within timeframes and with accuracy, excellence and relevance to a client's situation.
- Oversee the various channels of client communication, ensuring that communication is accurate, appropriate, clear and aligned with CAP's values.
- Monitor and balance the ongoing workload of the team to ensure that clients are helped within set timeframes.
- Works with the Head of Client Services and the other Client Services Team Leads to ensure workflows are being followed and are working effectively, and adjusting where needed.
- Establish, monitor, and report on KPIs, performance measures and operational plan goals for the New Clients team.

#### *Performance Indicators or Measurable Outputs:*

- The number of enquiries responded to and subsequent bookings
- The number and accuracy of completed budgets and other service outputs
- KPIs relating to client wait times, such as budget delivery dates
- Measurable competency, skill and qualification uplifts across the New Clients team

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

- Build and maintain strong relationships with Regional Managers and Frontline staff, to enable a streamlined, consistent and solutions-oriented 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
- Work with the Complaints Officer to respond to, resolve, and register any complaints regarding the New Clients team, as they arise.
- Provide relevant and up-to-date information and reports to other teams to enable them to perform their roles more effectively.
- Where appropriate, work with the Head of Client Services to establish and maintain external relationships to help facilitate the best possible outcomes for clients.
- Work with the Head of Frontline Delivery to optimise relevant training sessions at frontline coach training

#### *Performance Indicators or Measurable Outputs:*

- Client outcomes and impacts resulting from the mahi of the New Clients team
- Impact measures based on client feedback
- The number and nature of client complaints

### 3. Lead and manage all direct reports, and facilitate their development

- Empower team members to make firm and compassionate decisions regarding clients situations.
- Build a healthy culture within the New Clients 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 Māori 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 develop direct reports according to the Client Services Development Framework and other opportunities
- When needed, manage the performance, and/or facilitate the care of, direct reports in consultation with the Head of Client Services and Head of ER.
- Recruit and induct new staff as necessary to ensure that the New Clients Team is effectively and efficiently staffed

Performance Indicators or Measurable Outputs could include:

- The New Clients 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. Contribute to and enable innovations and improvements to the work of the New Clients Team

- Working with the Head of Client Services and the other Services Department Leaders, contribute to the design and improvement end-to-end service offering.
- Working the Head of Client Services and the other Services Department Leaders, contribute to the evaluation of CAP's services to make sure service delivery practices are continually fit for purpose and effective – in line with CAP's strategic direction.
- Working the Head of Client Services and the other Services Department Leaders, contribute to projects and initiatives that will help enable CAP to become an industry leader in client care, debt solutions, and financial empowerment.
- 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 its 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.

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.

- Attend one Fundraising Dinner per year to support the event and connect with CAP's supporters.
- Help out with 3-4 CAP Church Talks per year around Aotearoa, either by supporting or doing the talk.

*Performance Indicators or Measurable Outputs:*

- 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 New Clients budget

## 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.
- Ability to work comfortably and well in a workplace where a variety of expressions of Christian faith are represented, including those that tend to be 'charismatic'.
- Ability to work 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 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

- Proven ability to lead a team 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 problem-solving and finding solutions
- Excellent mathematical and analytical skills with a proven focus on accuracy
- 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

### Education

- Tertiary level qualification or industry qualification in relevant area

**Job description prepared by:** Abbey Peters, Services Director

**Last Updated:** Dec 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: