



## POSITION DESCRIPTION

<b>Title</b>	<b>Client Services Officer - Operations CBB Salary Packaging</b>					
<b>Manual</b>	<b>Section</b>	<b>Reference</b>	<b>Pages</b>			<b>Date</b>
<b>HR</b>	<b>16</b>	<b>06</b>	<b>1</b>	<b>of</b>	<b>3</b>	<b>01/07/2009</b>

### ATTACHMENTS

Person Specification

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### POSITION PURPOSE

To deliver salary packaging services to Clients, as directed by the Operation Manager - Salary Packaging.

To provide advice and assistance to new and existing clients regarding CBB Salary Packaging Services face to face or via the CBB Helpline.

### REPORTING/WORKING RELATIONSHIP

This position reports to the Operation Manager - Salary Packaging.

### DIRECTLY MANAGES

n/a

### ESSENTIAL POSITION RESULTS

1. CONTRIBUTES TO THE EFFECTIVE PERFORMANCE OF CBB'S SALARY PACKAGING SERVICE BY:
  - Providing specialist advice and assistance to clients and organisations regarding salary packaging services, benefits and processes
  - Ensuring timely and accurate responses are made to all enquiries
  - Ensuring client sign-ups procedures are completed in an effective manner
  - Maintaining up to date client records
  - The accurate and timely processing of salary packaging requests
  - Collecting and entering client data information
  - Liaise with relevant banks in regards to salary packaging products
  - Following policies and procedures and contributing to the review of policies and procedures
  - Ensuring compliance with the requirements of the Privacy Act
  - Other duties as directed

2 MAINTAINS HEALTHY AND SAFE WORK PRACTICES by:

- Ensuring the work area is free from hazards while office equipment is maintained in a safe working order, adhering to occupational health and safety policies and procedures

3 MAINTAINS A CULTURALLY AWARE AND SENSITIVE PROFILE WITH THE CUSTOMER BASE OF THE ORGANISATION by:

- Adhering to the CBB values and contributing to staff development, knowledge and understanding of cultural diversity.

4 SPECIAL CONDITIONS:

- Required to work flexible hours
- Compliance with all CBB Policies and Procedures, in particular ensuring compliance with EEO, OHS&W , and Privacy Policies, particularly as they apply to the relevant legislation

**POSITION DESCRIPTION REVIEW**

This position Description is to be reviewed on or before **30<sup>th</sup> June 2010**

**SIGNED .....**  
Employee

**DATE...../...../.....**

**SIGNED .....**  
Chief Executive Officer

**DATE...../...../.....**



## PERSON SPECIFICATION

<b>Title</b>	<b>Client Services Officer - Operations CBB Salary Packaging</b>
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### SKILLS and ABILITIES

- Demonstrated superior customer service skills to ensure client satisfaction
- Good communication and personal presentation skills
- Good interpersonal skills
- A methodical approach to organising work and work priorities
- An ability to work within a team environment
- An ethical approach to dealing with people and empathy with the community sector
- Competency in using Personal Computers and business software
- Demonstrated ability to organise workloads to meet deadlines
- Proven ability to work collaboratively and contribute to team goals
- Highly developed data entry skills to ensure the prompt and accurate updating and processing of information
- Proven ability to explain, in simple terms, financial concepts and information to clients
- Proven ability to use the Internet and current Microsoft Office suite of software
- Well developed numeracy and financial calculations skills
- Proven ability to adapt to a changing work environment

### KNOWLEDGE

- A knowledge of or ability to quickly learn CBB Salary Packaging services and issues
- A knowledge of the community services sector and commitment to the values of not-for-profit organisations

### EDUCATIONAL QUALIFICATIONS AND EXPERIENCE

- Experience in service delivery and customer relations, ideally in a financial services environment

### DESIREABLE

- Well developed working knowledge of salary packaging, credit management or similar
- Experience working with community organisations (as an employee or volunteer)
- Possession of current Class 1 driver's licence

### PERFORMANCE MEASURES

- Compliance with CBB Customer Service Standards

### SPECIAL CONDITIONS

- A satisfactory Police clearance is required for employment approval
- Some after-hours work may be required from time-to-time to meet deadlines, this will occur by the provision of suitable notice or agreement between the parties
- A current and valid driver's licence would be well regarded
- Compliance with all CBB Policies and Procedures, in particular ensuring compliance with EEO, OHS&W , and Privacy Policies, particularly as they apply to the relevant legislation