Position Description

Role:	Personal Consultant
Business Unit:	Financial Administration
Classification:	State Trustees Level 3
Location:	Bendigo
Reporting to:	Team Leader, Contact Centre
Direct Reports:	None

Organisational Environment

State Trustees is a state government owned company that plays an important role in building awareness and educating the community to protect the legacy and financial affairs of Victorians - we believe every Victorian deserves to live on, that's why we exist.

We have an uncompromisingly client-focused working environment that is supportive, inclusive and team-oriented. We employ people from a range of backgrounds and industries enabling us to provide administration, trustee and estate related services - as well as, the State's community services obligations, for the public benefit, often in circumstances where no other provider will meet their needs.

We make a difference in the lives of Victorians by providing an empathetic, dedicated and client centric service - the best interests of our clients are at the heart of everything we do.

Financial Administration

The Financial Administration business unit is responsible for helping clients by providing supportive services to assist them in ensuring financial security, management of legal interests and access to entitled benefits.

Financial Administration clients are those Victorians who the Victorian Civil and Administrative Tribunal (VCAT) has determined should have their financial affairs administered by State Trustees. There are currently approximately 9500 VCAT appointed clients. Financial Administration employees are located at Footscray, Dandenong and Bendigo.

The impact you'll have….

The Personal Consultant takes inbound calls and resolves enquiries from clients have who have been appointed by VCAT and no longer have the capacity to manage their own affairs.

As a Personal Consultant in the Contact Centre your purpose is to ensure that clients experience a smooth and efficient service with State Trustees.

You will be participating in a team aimed at minimising incoming calls into the Contact Centre through education with State Trustee clients and stakeholders.

Accountabilities

Accountability	Key activities to deliver on accountability
Managing inbound calls	• Identifies and resolves calls by taking ownership of queries • Utilises professional telephone techniques and ensures communication is effective and appropriately tailored to the audience including clients with disabilities such as brain injury, psychiatric illness and communication impairments • Approves payments within limits authorised by the State Trustees Client Authorities Policy and within budget allowance in the least restrictive manner • Transfers calls externally to the Contact Centre only when the enquiry requires so based upon the request. • Adheres to rostering and “sign-on” schedules to ensure the Contact Centre is adequately staffed at all times ensuring client wait times are minimised with maximum attendance. • Complies with legislation, policies, work instructions and Contact Centre Key Performance Indicator’s.
Stakeholder Engagement	• Liaises promptly and efficiently with internal stakeholders to transfer and/or resolve caller enquiries • Takes calls from clients, their support persons and other external stakeholders in regard to clients’ financial and legal circumstances • Builds and maintains strong relationships with all key internal and external stakeholders
Information Management	• Records all events and communications with clients, support persons and stakeholders in the appropriate systems (e.g. STRATIS) • Provides clients with information on their financial affairs and position when requested

Decision making

Decisions made independently by this position:	• Resolving enquiries from clients including approving payments in the best interests of the clients and in the least restrictive manner • Recommendations to supervisor about how to manage risks • Expenditure in line with levels authorised by the State Trustees Client Authorities Policy and Corporate Delegation of Authority
Decisions made after consultation with supervisor:	• Departing from usual business processes to account for unusual complexity/risk
Decisions referred to supervisor:	• Workflow allocation • Expenditure beyond levels authorised by the State Trustees Client Authorities Policy and Corporate Delegation of Authority

Key communications

Contact / organisation	Purpose of communication
Internal	
Team Leader, Contact Centre	To keep informed of achievements, plans, issues/challenges and learnings
Personal Financial Consultants	To seek and/or clarify information regarding clients' financial and legal affairs and transfer calls when required
External	
External Support Persons and Services (e.g. family members, case managers, social workers, etc)	To resolve their queries regarding clients' financial position and affairs

Knowledge, skill and experience requirements

Essential:

- Experience in a busy customer service and team based environment
- Well-developed communication skills (written and spoken)
- Minimum 40wpm typing speed with high level of accuracy
- Competent financial literacy and understanding of simple budgets
- Basic computer literacy including competent use of Microsoft Office

Desirable:

- Experience in a busy contact centre environment
- Understanding and experience dealing with clients with a disability
- Knowledge of relevant legislation, particularly the Trustees Act 1958, Guardianship and Administration Act 1986 and State Trustees (State Owned Company) Act 1994

Key Competencies

Financial literacy and numeracy: Apply intermediate knowledge of maths and financial concepts
Building and maintaining relationships: Develop and nurture key internal and external contacts
Problem solving and decision making: Solve problems and make decisions with minimal guidance
Time management: Plan and organise time outside established priorities
Influencing and negotiating: Influence and negotiate with moderate autonomy
Client focus: Add immediate value to clients and stakeholders