

Position Description

Role:	Head of Client Service Centre
Business Unit:	Financial Administration
Classification:	State Trustees Level 7 (STL7)
Location:	Bendigo
Reporting to:	General Manager, Financial Administration
Direct Reports:	Client Service Centre Team Leaders, Workforce Planner

State Trustees

State Trustees is Victoria's public trustee providing a vital service for Victorians, who, due to mental illness, injury or disability, are unable to independently manage their own financial and/or legal affairs.

Will writing, power of attorney, executor services, trustee services and financial administration are just some of the services State Trustees provides for its clients, while maximising its contribution to the economy and wellbeing of the State of Victoria.

State Trustees is a state-owned company and operates from three offices, Footscray, Dandenong and Bendigo.

At State Trustees, we are passionate about raising awareness and educating the community on issues that affect all Victorians, including the importance of wills and preventing financial elder abuse.

Financial Administration

Financial Administration 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.

The impact you'll have....

The Head of Client Service Centre role is responsible for leading a contemporary, client centric service function that acts as the primary engagement hub and front door for our Financial Administration clients.

The role is accountable for delivering seamless, client experiences and outcomes across multiple channels, ensuring that the needs of all clients, particular vulnerable individuals, are met with empathy, efficiency and quality outcomes.

The role will lead the transformation of the current service model into a proactive, insight led Client Service Centre that delivers seamless and high-quality client experiences for Victoria's most vulnerable community members. This includes establishing end to end ownership of client journeys, driving first point resolution, and enabling omnichannel service delivery across phone, digital, written, and proactive outreach channels. The function will embed continuous improvement informed by client insights and data, while ensuring strong alignment with organisational strategy and the delivery of meaningful, consistent and measurable client outcomes.

Accountabilities

Accountability	Key activities to deliver on accountability
Client Experience & Outcomes	<ul style="list-style-type: none"> • Own and continuously improve end-to-end client journeys across all service channels • Ensure services are accessible, responsive, and tailored to client needs, particularly vulnerable customers • Drive a culture and performance of first contact resolution and reduced client effort across all interactions • Capture and leverage client insights, feedback and complaints data to inform service improvements and systemic change • Act as a client advocate, identifying systemic issues and influencing change across the organisation, especially in Financial Administration.
Service Delivery & Operational Performance	<ul style="list-style-type: none"> • Accountable for the delivery of consistent, high-quality service across an omnichannel Client Service Centre • Balance efficiency with quality and outcomes, ensuring service metrics reflect client value (not just volume) • Develop and embed workforce strategies that focus on capability, flexibility, and wellbeing • Define, monitor and continuously improve performance against modern service metrics, including: <ul style="list-style-type: none"> ○ First contact resolution ○ Client satisfaction (CSAT) ○ Client effort ○ Time to resolution • Ensure consistent, high-quality documentation, governance, and compliance across all client interactions
Strategic Leadership & Transformation	<ul style="list-style-type: none"> • Lead and own the evolution from a traditional contact model to a modern Client Service Centre operating model • Proactively contribute to enterprise strategy by providing insights from client interactions and trends • Identify and drive opportunities for: <ul style="list-style-type: none"> ○ Process redesign ○ Automation and digital enablement ○ Self-service capabilities • Drive cross-functional collaboration to ensure a connected and consistent client experience across the organisation
Continuous Improvement & Innovation	<ul style="list-style-type: none"> • Embed a culture of continuous improvement, accountability and service excellence • Leverage data, reporting and analytics to proactively identify trends, risks, and opportunities • Apply contemporary service design and client journey mapping approaches • Lead initiatives that reduce friction and improve client outcomes • Foster a test-and-learn mindset, encouraging innovation and experimentation

Accountability	Key activities to deliver on accountability
Leadership & People Development	<ul style="list-style-type: none"> • Lead, coach and develop leaders and teams to build a high-performing, engaged workforce • Build a culture of accountability, collaboration, and psychological safety • Build capability in: <ul style="list-style-type: none"> ○ Client engagement ○ Problem solving ○ Managing complex and vulnerable client needs • Ensure robust performance management, development planning, and succession capability is in place
Change Leadership	<ul style="list-style-type: none"> • Lead and embed organisational change impacting the Client Service Centre • Assess impacts of change initiatives on client experience and operations • Drive adoption of new processes, technologies, and service models • Manage risks, resistance, and communication associated with change • Define, track and report on success measures for transformation initiatives
Governance & Risk	<ul style="list-style-type: none"> • Ensure all service delivery consistently aligns with legislation, policy, and organisational standards • Monitor quality assurance outcomes and implement improvements • Partner with Risk, Audit, and Compliance to strengthen controls • Proactively identify, manage and mitigate operational and client-related risks

Decision making

Decisions made independently by this position:	<ul style="list-style-type: none"> • Workforce planning and resourcing strategies • Day-to-day operational decisions and escalations • Performance management actions • Implementation of service delivery improvements within delegated authority
Decisions made after consultation with supervisor:	<ul style="list-style-type: none"> • Enterprise-wide changes to process or service delivery models
Decisions referred to supervisor:	<ul style="list-style-type: none"> • Significant risks, reputational issues, or matters beyond delegation

Key communications

Contact / organisation	Purpose of communication
Internal	
Financial Administration	Collaborate on service delivery, client outcomes, and continuous improvements initiatives
Operations Teams	Coordinate service delivery, manage dependencies, and optimise client service outcomes.
Corporate Services	Manage risk, compliance, budgeting, and operational support.

Contact / organisation	Purpose of communication
People & Culture	Partner with People & Culture to build workforce capability, support wellbeing, recruitment, and development.
Communications & Marketing	Align client messaging, service communications, and proactive outreach strategies to ensure clear, consistent, and accessible engagement across all channels.
Technology / Digital Teams	Partner to improve client-facing systems, enable digital service channels, support automation and innovation to enhance the overall client experience through technology.
External	
Third-party organisations	Build and maintain strategic relationships to support client needs.
Clients and their representatives	Ensure clear, empathetic, effective and accessible communication across all service channels, particularly for vulnerable clients.
Government agencies and service providers	Coordinate outcomes for mutual clients and ensure integrated service delivery.

Knowledge, skill and experience requirements

Essential:

- Tertiary qualification in a relevant discipline or equivalent executive leadership experience.
- Extensive senior leadership experience within a client-facing service environment supporting vulnerable, disadvantaged, high-risk or complex client cohorts.
- Proven success leading service transformation, operating model redesign and client experience improvement initiatives.
- Demonstrated experience implementing technology-enabled service solutions, including AI, automation, digital channels, self-service capabilities and workflow optimisation.
- Strong track record delivering measurable improvements in client outcomes, service performance, operational efficiency and employee engagement.
- Demonstrated ability to use data, insights and analytics to inform decision-making, identify risks and opportunities, and drive continuous improvement.
- Significant experience leading and developing teams, building capability, engagement, accountability and future leadership pipelines.
- Highly developed stakeholder management, influencing and communication skills, with the ability to advocate for vulnerable clients while balancing organisational priorities.
- Strong understanding of risk management, governance, compliance and safeguarding frameworks, with experience managing high-risk client matters and operational risks.
- Demonstrated ability to lead organisational change, foster innovation and embed a culture of continuous improvement and service excellence.
- Experience designing and delivering services that improve accessibility, responsiveness and outcomes for vulnerable or distressed clients.

Desirable:

- Knowledge of relevant legislation including Guardianship & Administration frameworks
- Recent experience in public sector, trustee services, or human services environments