

Role Description

Customer Advocacy Officer



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| Cluster | Stronger Communities |
| Department/Agency | NSW Trustee & Guardian |
| Division/Branch/Unit | Customer Experience / Customer Voice |
| Role number | TBA |
| Classification/Grade/Band | Clerk Grade 7/8 |
| Senior executive work level standards | Not Applicable |
| ANZSCO Code | 511112 |
| PCAT Code | 1119192 |
| Date of Approval | 9 May 2022 |
| Agency Website | www.tag.nsw.gov.au |

Agency overview

NSW Trustee & Guardian protects, promotes and supports the rights, dignity, choices and wishes of the people of NSW. The agency supports the Chief Executive Officer and the Public Guardian to provide customer-centred services to the people of NSW, including some of the state's most vulnerable. We do this by providing a range of multidisciplinary services including Will-making, estate planning, executorship, trustee, financial management and guardianship services.

We write more than 13,000 estate planning documents each year, support over 47,000 customers annually and manage over seven billion dollars in customer assets. A NSW government agency within the Stronger Communities Cluster, our services help support and protect people at critical moments in their lives.

Division Overview

The Customer Experience division provides a wide range of specialist support across NSW Trustee & Guardian divisions including customer advocacy support, service design, business development, marketing, brand, communications, and media services.

Primary purpose of the role

This role is directly responsible for providing an independent customer voice and representation in relation to reviews of service delivery, significant initiatives that impact customers and stakeholder engagements. This role provides specialist customer advice, drawing together available data sources and information to identify themes, investigate root causes and assist with service improvement initiatives. Importantly the role works collaboratively with Practice leads across NSW Trustee & Guardian to help improve customer outcomes.

Key accountabilities

- Represent NSW Trustee & Guardian customers in all Complex Case Reviews, Call and Email monitoring sessions, independent of operational constraints and alliances, to improve service delivery.
- Develop a strong understanding of all customers, proactively drawing together insights and learnings from all internal data sources and external desk research or stakeholder engagement, and staying up to date with current issues, opportunities, and trends.
- Maintain and nurture strong stakeholder relationships with key sectors and stakeholders including government agencies and other peak industry bodies, to leverage and share best practice customer learnings.
- Contribute to Federal and State Government inquiries and policy submissions, as customer subject matter expert, in accordance with approved timeframes to support organisational requirements.
- Contribute to staff capability development, with particular focus on customer awareness and issues training, improving the quality of customer service provided to customers and ensuring alignment with policies and NSW Trustee & Guardian's Customer Excellence principles.
- Support the Community Education team in promoting community awareness of services and understanding customer rights as well as attendance at key events.
- Drive and support the ongoing development of a customer centred culture across organisation through the provision of knowledgeable customer information to embed best practice customer-centric behaviours.
- Monitor and implement reviews to identify opportunities for continual improvement of quality outcomes.

Key challenges

- Managing competing demands and priorities to generate favourable outcomes for customers and stakeholders.
- Fostering effective collaborative relationships, with both internal and external stakeholders, whilst independently representing customers and building staff capability.
- Continuing to build knowledge of contemporary customer trends and developments, and their application in a community service environment.

Key relationships

| Internal | |
|--|--|
| Who | Why |
| Manager Customer Advocacy | <ul style="list-style-type: none"> • Report to and collaborate with to discuss work strategies and priorities, providing updates on key issues and progress. • Escalates issues as appropriate. • Seek direction and support. |
| Directors, Senior Managers, Managers, and SMEs across NSW Trustee & Guardian | <ul style="list-style-type: none"> • Collaborate with to provide insights on strategic projects that improve NSW Trustee & Guardian customers outcomes. |
| Customer Experience Customer Voice and Customer Engagement teams | <ul style="list-style-type: none"> • Collaborate, support and implement strategic projects that support organisational goals. |
| Customer Experience Division | <ul style="list-style-type: none"> • Collaborate, contribute to divisional projects and initiatives. Provide expert advice and information to support colleagues' work. |
| All Staff | <ul style="list-style-type: none"> • Provide guidance and support to staff to deliver high quality services. |
| External | |

| Who | Why |
|--|--|
| Customers and families | <ul style="list-style-type: none"> Communicate to understand feedback, challenges and opportunity areas for improvement |
| Stakeholders, other agencies and community | <ul style="list-style-type: none"> Build and maintain effective, strong relationships to facilitate strategic projects that that improve NSW Trustee & Guardian customers outcomes. |

Role dimensions

Decision making

This role makes decisions and is accountable for Customer Advocacy initiatives for NSW Trustee & Guardian, ensuring performance targets and service delivery standards are met. The role works with a degree of independence and autonomy as directed by their Manager.

Consultation with the Manager Customer Advocacy takes place as necessary and where decisions and actions have strategic significance.

Reporting line

This role reports to the Manager Customer Advocacy.

Direct reports

Nil.

Budget/Expenditure

Nil.

Key knowledge and experience

- Extensive knowledge of NSW Trustee & Guardian's diverse customer base as well as important sectors such as disability, aged care, health and legal life planning.
- Demonstrated experience in working within complex situations and providing independent professional advice and judgments.

Essential requirements

- Tertiary qualifications and/or equivalent knowledge, skills and experience in a relevant discipline or industry such as health, social sciences or vocational training relevant to community services.
- Up to date COVID-19 vaccination status and able to provide acceptable proof.

Checks and Clearances

Appointments are subject to reference checks. Some roles may also require the following checks/clearances:

- National Criminal History Record Check in accordance with the Disability Inclusion Act 2014.
- Working with Children Check clearance in accordance with the Child Protection (Working with Children) Act 2012.

Capabilities for the role

The [NSW public sector capability framework](#) describes the capabilities (knowledge, skills and abilities) needed to perform a role. There are four main groups of capabilities: personal attributes, relationships,

results and business enablers, with a fifth people management group of capabilities for roles with managerial responsibilities. These groups, combined with capabilities drawn from occupation-specific capability sets where relevant, work together to provide an understanding of the capabilities needed for the role.

The capabilities are separated into **focus capabilities** and **complementary capabilities**.

Focus capabilities

Focus capabilities are the capabilities considered the most important for effective performance of the role. These capabilities will be assessed at recruitment.

The focus capabilities for this role are shown below with a brief explanation of what each capability covers and the indicators describing the types of behaviours expected at each level.

Focus capabilities

| Capability group/sets | Capability name | Behavioural indicators | Level |
|---|--|--|-------|
|  | Act with Integrity Be ethical and professional, and uphold and promote the public sector values | <ul style="list-style-type: none"> • Represent the organisation in an honest, ethical and professional way and encourage others to do so • Act professionally and support a culture of integrity • Identify and explain ethical issues and set an example for others to follow • Ensure that others are aware of and understand the legislation and policy framework within which they operate • Act to prevent and report misconduct and illegal and inappropriate behaviour | Adept |
|  | Value Diversity and Inclusion Demonstrate inclusive behaviour and show respect for diverse backgrounds, experiences and perspectives | <ul style="list-style-type: none"> • Promote the value of diversity and inclusive practices for the organisation, customers and stakeholders • Demonstrate cultural sensitivity, and engage with and integrate the views of others • Look for practical ways to resolve any barriers to including people from diverse cultures, backgrounds and experiences • Recognise and adapt to individual abilities, differences and working styles • Support initiatives that create a safe and equitable workplace and culture in which differences are valued • Recognise and manage bias in interactions and decision making | Adept |



Communicate Effectively

Communicate clearly, actively listen to others, and respond with understanding and respect

- Tailor communication to diverse audiences
- Clearly explain complex concepts and arguments to individuals and groups
- Create opportunities for others to be heard, listen attentively and encourage them to express their views
- Share information across teams and units to enable informed decision making
- Write fluently in plain English and in a range of styles and formats
- Use contemporary communication channels to share information, engage and interact with diverse audiences

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Work Collaboratively

Collaborate with others and value their contribution

- Encourage a culture that recognises the value of collaboration
- Build cooperation and overcome barriers to information sharing and communication across teams and units
- Share lessons learned across teams and units
- Identify opportunities to leverage the strengths of others to solve issues and develop better processes and approaches to work
- Actively use collaboration tools, including digital technologies, to engage diverse audiences in solving problems and improving services

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Deliver Results

Achieve results through the efficient use of resources and a commitment to quality outcomes

- Use own and others' expertise to achieve outcomes, and take responsibility for delivering intended outcomes
- Make sure staff understand expected goals and acknowledge staff success in achieving these
- Identify resource needs and ensure goals are achieved within set budgets and deadlines
- Use business data to evaluate outcomes and inform continuous improvement
- Identify priorities that need to change and ensure the allocation of resources meets new business needs
- Ensure that the financial implications of changed priorities are explicit and budgeted for

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Think and Solve Problems

Think, analyse and consider the broader context to develop practical solutions

- Identify the facts and type of data needed to understand a problem or explore an opportunity
- Research and analyse information to make recommendations based on relevant evidence
- Identify issues that may hinder the completion of tasks and find appropriate solutions
- Be willing to seek input from others and share own ideas to achieve best outcomes
- Generate ideas and identify ways to improve systems and processes to meet user needs

Intermediate



Project Management

Understand and apply effective planning, coordination and control methods

- Perform basic research and analysis to inform and support the achievement of project deliverables
- Contribute to developing project documentation and resource estimates
- Contribute to reviews of progress, outcomes and future improvements
- Identify and escalate possible variances from project plans

Intermediate

Complementary capabilities

Complementary capabilities are also identified from the Capability Framework and relevant occupation-specific capability sets. They are important to identifying performance required for the role and development opportunities.

Note: capabilities listed as 'not essential' for this role are not relevant for recruitment purposes however may be relevant for future career development.

| Capability group/sets | Capability name | Description | Level |
|---|-------------------------------------|--|--------------|
|  | Display Resilience and Courage | Be open and honest, prepared to express your views, and willing to accept and commit to change | Intermediate |
|  | Manage Self | Show drive and motivation, an ability to self-reflect and a commitment to learning | Intermediate |
|  | Commit to Customer Service | Provide customer-focused services in line with public sector and organisational objectives | Adept |
|  | Influence and Negotiate | Gain consensus and commitment from others, and resolve issues and conflicts | Intermediate |
|  | Plan and Prioritise | Plan to achieve priority outcomes and respond flexibly to changing circumstances | Intermediate |
|  | Demonstrate Accountability | Be proactive and responsible for own actions, and adhere to legislation, policy and guidelines | Intermediate |
|  | Finance | Understand and apply financial processes to achieve value for money and minimise financial risk | Foundational |
|  | Technology | Understand and use available technologies to maximise efficiencies and effectiveness | Intermediate |
|  | Procurement and Contract Management | Understand and apply procurement processes to ensure effective purchasing and contract performance | Foundational |