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CANDIDATE BRIEFING DOCUMENT

STATE RELATIONSHIP MANAGER, SYDNEY
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Our Story

Community Business Bureau Inc (CBB) was formed on 1 July 1995, as a wholly independent incorporated organisation, evolving from the restructuring of the Spastic Centres of South Australia (now known as scosa, Cara and CBB). Through restructuring, separate agencies were formed and CBB was established to service the administration requirements within the community services sector, in particular to meet their payroll and financial needs.

Today, CBB is a unique organisation with a **clear purpose** to help the Not for Profit sector achieve its social objectives. Based in Adelaide, Darwin, Perth, Sydney and Melbourne and servicing not for profit organisations all over Australia, CBB has over 60 staff members, committed to the continuing development of **our products and services** to better serve the community and relevant government sectors.

First based on the Woodville campus, 13 enthusiastic staff embarked on an exciting inaugural year, which saw the Community Business Bureau evolve into an independently incorporated association, governed by a new board of management. During this period CBB established itself as a not-for-profit business enterprise, operating on a fee for service basis, providing financial, payroll, human resources and training services to the community sector.

In the first year of operation, CBB enjoyed much success with client numbers rising from 25 to 83 in the first year, contributed mainly by the long-term commitment of the Spastic Centres Network agencies to continue to utilise CBB's services.

Over the years, CBB expanded its range of services and to coincide with the 2001 introduction of tax changes for public benevolent institutions (PBIs), CBB established a **salary packaging** product to offer to the marketplace.

To honour the life and memory of Keith Fulton, CBB foundation Board Member, and his commitment to leadership development and lifelong learning, the inaugural **Keith Fulton Memorial Scholarship** was created in 2004. This scholarship continues to provide an opportunity to enhance the leadership skills of people in the community sector, especially those who may not ordinarily have such an opportunity.

Our reach and impact

When the not for profit workforce has well-developed business skills, and knows how to apply them for social impact, they can get more done for communities in need.

For more than 20 years we've been operating as a not for profit social enterprise, growing to a team of over 60 staff and serving more than 650 organisations around Australia - from small groups working at the "grass roots", to large, established organisations.

We intend to grow our national footprint and increase our reach to help even more not for profit organisations do better business.

Our vision

A thriving not for profit sector that is achieving its social objectives.

Our mission

Champion better business practices to deliver social impact.

Our values

CBB staff will always be ethical in our dealings with clients and stakeholders. We shall offer and deliver services in a manner which reflects strong commitment to the following values:

- ▶ Respect
- ▶ Integrity
- ▶ Service
- ▶ Empowerment

For more information visit www.cbb.com.au



Message from our CEO



“What a great time to be joining CBB.

Thank you for taking the time to consider joining the CBB and partnering with us to grow and amplify our social impact nationally.

With over 650+ clients across 1,500 client locations across Australia; and growing, a strong leadership team, financial sustainability, CBB is in a unique position to contribute to the mission of each and every organisation across the not-for-profit sector:

- ▶ By developing and nurturing strategic partnerships, increasing client access to CBB products and services.
- ▶ Across these priority areas – charitable organisations working in areas of disability, health, welfare, indigenous services, and other community services to manage their organisations and activities efficiently and effectively.
- ▶ Through the provision of tailored solutions to support financial viability and sustainability of charitable organisations, as well as promoting good governance and management and new business approaches.
- ▶ Which will create measurable improvements in charitable organisations financial viability, profitability, resilience, and long-term sustainability.
- ▶ Which will lead to better social outcomes for people who are disadvantaged by reason of disability, culture, or personal circumstances (health, life satisfaction and social inclusion).

I’m so very proud of the CBB team – we are a strong team with an unwavering commitment to ongoing service excellence and innovation to support the continued growth of personalised services to our amazing not for profit clients”.

Michael Elias
CEO

The Advertised Role

STATE RELATIONSHIP MANAGER, SYDNEY

- ▶ **Leading Social Enterprise**
- ▶ **Providing Salary Packaging & Advisory Services to Not for Profits**

Community Business Bureau (CBB) was established in 1995 with a mission to build the capacity and sustainability of fellow not for profit organisations. Today CBB provides cost-effective, responsive and personalised salary packaging and business consulting services to over 650 clients Australia-wide.

Reporting to the General Manager, Salary Packaging & Growth, our client is recruiting an Olympic Park, Sydney based State Relationship Manager responsible for providing high quality client experiences across metropolitan and regional NSW, as well as developing ongoing productive relations within current and potential new client organisations.

Key accountabilities include:

- ▶ Building and maintaining high level relationships across client organisations
- ▶ Providing contemporary, accurate and pertinent salary packaging information to clients and customers
- ▶ Providing Advisory Services through the introduction of CBB's strategic Partners
- ▶ Enhancing our NFP customer's experience

The successful candidate will demonstrate a successful and proven track record of client focused service delivery and development of new business opportunities underpinned by excellent interpersonal skills and ability to positively influence decision makers from management level through to the Board.

You will be self-motivated and driven with the ability to work autonomously and possess outstanding communication skills, being able to effectively present and tailor messaging to individuals or groups. Strong prioritising skills, an ability to solve problems and devise effective, workable solutions for clients is a "must" as is the demonstrated ability to develop and nurture productive working relationships with all stakeholders, both internal and external to the organisation.

Strong numeracy skills with an ability to grasp financial concepts are also required whilst an understanding of the not-for-profit sector is desired but not essential.

For details of the Position Description visit www.vuca.com.au/cbbsrm. For further enquiries, contact VUCA Senior Associate, Paul Bell on 0412 552 302 for a confidential discussion during business hours. **Please forward your letter of application and CV in MS Word format to cbbsrm@vuca.com.au by COB Friday 5th November 2021.**

Position Description

Reporting to:	State Relationship Manager
Reports to:	General Manager, Salary Packaging & Growth
Direct reports:	1

Community Business Bureau (CBB) is a unique organisation with a clear purpose to help not for profit organisations to achieve their social objectives. We're dedicated to building the capacity and sustainability of NFPs through our expert business consulting and salary packaging services. Based in Adelaide, Perth, Sydney, and Darwin, CBB has over 60 staff members committed to the continuing development of our products and services to better serve the community. Our offering includes partnerships with national brands such as Beyond Bank and StreetFleet.

For more than 20 years we've been operating as a not-for-profit social enterprise, serving more than 650 clients around Australia – from some of the largest not for profits in the country through to smaller, regional organisations. We don't exist to pay shareholders and we aren't driven by pure commercial objectives. We fulfil our purpose not only through our work, but through our Community Development Program, which supports the sector through grant funding and scholarships. We intend to grow our national footprint and increase our reach to help even more not for profit organisations be better at what they do.

Our strategic intent

CBB plays an integral role in the not-for-profit sector achieving its social objectives. We do this by being a leading social enterprise providing personalised, professional services to Australian not for profits.

Our values

- ▶ Respect
- ▶ Integrity
- ▶ Service
- ▶ Empowerment

Position Purpose

As a member of the CBB Relationship team, the State Relationship Manager – based in Sydney NSW, will be responsible for providing high quality customer experience throughout NSW, as well as building ongoing productive relations with important contacts within current and potential new client organisations. You will develop new business opportunities through prospecting, qualifying and presenting proposals to win new clients.

This position will have the following key responsibilities:

- ▶ Obtaining new client contracts
- ▶ Build and maintaining high level relationships across the client base
- ▶ Providing up to date, accurate and pertinent salary packaging information to clients and customers
- ▶ Building business through the introduction of our Partners
- ▶ Keeping accurate CRM (& Pipeline) records

Key Stakeholders

- ▶ General Manager, Salary Packaging & Growth, State Relationship Managers & Relationship Manager's
- ▶ Managers of Customer Care & Operations / Admin
- ▶ Important contacts of current and prospective clients
- ▶ Partnerships

Key challenges

- ▶ Maintaining high level relationships within a fast-changing environment
- ▶ Keeping abreast of the challenges in the sector(s)
- ▶ Negotiating service agreements to ensure a win/win scenario
- ▶ Maintaining awareness of our commercial competitors' offerings

Key result areas

1. Develop new business and grow CBB Salary Packaging clients
2. Contribute to the effective performance of CBB's Salary Packaging results
3. Implement effective client retention and development programs with new and existing client organisations
4. Maintain sound knowledge of Salary Packaging products/ policies and procedures
5. Ensure effective workplace health and safety (WHS) practices
6. Be a part of the CBB team

Key result areas

KRA 1: Develop new business and grow CBB Salary Packaging clients

- ▶ Using initiative to define target markets, opportunities, and referral business and grow low take up rate locations.
- ▶ Presenting to potential clients, inclusive of Executives/Boards and staff
- ▶ Follow up pipeline to win new business.
- ▶ Oversee implementation to ensure a smooth transition to CBB

Success in this KRA will be demonstrated by:

- ▶ Achieving set growth targets
- ▶ Referred business
- ▶ Successful implementations

KRA 2: Contribute to the effective performance of CBB's Salary Packaging results

- ▶ Providing specialist advice and assistance to clients and potential clients
- ▶ Negotiate service outcomes that are consistent with CBB's capacity to deliver
- ▶ Negotiating price outcomes that are consistent with approved CBB pricing
- ▶ Contribute positively to the Relationship team meetings, training and with general office administration

Success in this KRA will be demonstrated by:

- ▶ Contracts in place that meet pricing and service expectations
- ▶ Great survey results – achieve set benchmarks
- ▶ Contribution within Team

KRA 3: Implement an effective client retention and development programs with new and existing client organisations.

- ▶ Build and action effective travel plans
- ▶ Manage individual accounts and follow through with designated programs
- ▶ Ensure new employees are a key focus during visits
- ▶ Ensure service agreements are renewed on time, with sufficient prior contact made and follow-up

Success in this KRA will be demonstrated by:

- ▶ Achieving retention targets
- ▶ Survey results reaching set benchmarks

KRA 4: Maintain sound knowledge of salary packaging products/policies and procedures

- ▶ Ensure all salary packaging knowledge is up to date as per policies and procedures.
- ▶ Communicate to management any new information to hand on opportunities, competitors, products etc.

Success in this KRA will be demonstrated by:

- ▶ Records are maintained and updated
- ▶ Accurate information and procedures are provided and performed
- ▶ Initiating self-assessing and highlighting training needs to direct Manager

KRA 5: Ensure effective workplace health and safety (WHS) practices

- ▶ Be responsible for maintaining a tidy office environment
- ▶ Ensure personal work areas are free from hazards
- ▶ Assist in the evaluation of hazards on CBB property or assets
- ▶ Ensure reporting of any incidents or near misses either directly involved in or witnessed by you
- ▶ Ensure any equipment (including vehicles) are maintained and in safe working order
- ▶ Ensure your own actions or lack of action does not place you or others' physical and/or psychological safety at risk
- ▶ Comply with all WHS legislation, policies and practices

Success in this KRA will be demonstrated by:

- ▶ Minimisation of WHS incidents and near incidents
- ▶ Positive contribution to the WHS of all CBB employees, customers and visitors

KRA 6: Be a part of the CBB team

- ▶ Embrace and integrate CBB's purpose, values and behavioural expectations into your role
- ▶ Be a positive and proactive contributor to CBB's quality and continuous improvement agenda
- ▶ Comply with CBB's conditions of employment, code of conduct, standards of behaviour, confidentiality, fair treatment and other human resources, workplace health and safety and organisational policies and procedures
- ▶ Support CBB's commitment to diversity and Employment Opportunity (EO) in the workplace including, but not limited to the Aboriginal Reconciliation Action Plan and the general provision of culturally competent and respectful services
- ▶ Contribute to and maintain a positive team environment including proactively contributing to CBB's quality and continuous improvement agenda and customer focus
- ▶ Be a positive contributor to team and organisational goals and ensure that you report to work in a fit state to perform all duties
- ▶ Perform other duties as reasonably required within scope of skills and experience and where agreed perform duties that contribute to your professional development

Success in this KRA will be demonstrated by:

- ▶ The provision of quality customer outcomes
- ▶ Performance reviews that reflect the display of positive CBB behaviours
- ▶ Positive contribution to CBB's customer focus culture

Person Specifications

Essential experience, knowledge and attributes

- ▶ Proven ability to develop and gain new business
- ▶ Demonstrate ability to work autonomously, self-motivated and driven
- ▶ Sales experience dealing with decision makers from management level through to Board
- ▶ Experience in customer focussed serviced delivery
- ▶ High level of written and verbal communication, good presentation skills to groups and individuals

Desired experience, knowledge and attributes

- ▶ Confident selling skills, including prospecting and qualifying
- ▶ A methodical approach to organising work and work priorities
- ▶ Strong problem-solving ability
- ▶ Passionate relationship builder
- ▶ Numeracy skills and financial understanding

Personal attributes/capabilities

At CBB, we live our values through:

▶ RESPECT	▶ INTEGRITY	▶ SERVICE	▶ EMPOWERMENT
<ul style="list-style-type: none"> - Respectful - Sensitive to others 	<ul style="list-style-type: none"> - Professional behaviour - Composure under pressure 	<ul style="list-style-type: none"> - Adapting to differences - Trustworthy 	<ul style="list-style-type: none"> - Open to feedback - Lifelong learning

Conditions of employment

- ▶ 6-month probation period applies
- ▶ Drivers Licence
- ▶ National Police Check
- ▶ Regular out of hours work is required
- ▶ All employees must undergo an annual performance review with their direct manager

Contact Information

For a confidential discussion regarding the State Relationship Manager, Sydney, please contact VUCA Senior Associate, Mr Paul Bell on 0412 552 302.

Applications, including your current CV and a letter of introduction are to be forwarded in Word format to cbbsrm@vuca.com.au.

Applications close COB Friday 5th November 2021.

Important Information

Please note that VUCA Trusted Advisors believes that while the information contained in this document is true to the best of the Company's knowledge at the time of writing, such information may change without notice. Further, the information herein is the property of the Company and must not be published or attributed unless explicitly agreed.