

## AVANTI FINANCE

### POSITION DESCRIPTION FOR RELATIONSHIP MANAGER - AUTO

Avanti Finance Group is a privately owned non-bank lender operating across New Zealand, and Australia. We are on a growth mission to lead and inspire our industry through innovation, and the development of exceptional financial services products whilst fostering a motivated and engaged workplace culture that is centered around personal growth and high performance.

This role reports to the National Sales Manager – Auto with the responsibility of promoting and developing strong relationships with new and existing introducers with a mission of driving open and positive relationships between Avanti staff and introducers. To align with the Group's strategic plan, this role will be a sound source of market intelligence built through relationships as well as a hunger to learn by asking questions, and seeking answers that strengthen our overall understanding of the market and build a reputation of innovative product development.

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#### THIS ROLE WILL BE RESPONSIBLE FOR:

##### *Selling Strategically*

- **Budget Champion:** Have a solid grasp of our New Business budgets, strategy, and long-term goals.
- **Hit the Streets:** Be out there shaking hands (virtually or in person) proactively establishing referral networks with Dealers and other potential Introducers.
- **Monitor Progress:** Set clear objectives to achieve success and adjust as needed to stay on track. Be adaptable in approach to achieving objectives and collaborate strategically across the Group and be a part of shaping our Sales and Marketing plan.

##### *Innovative Relationships*

- **Develop Key Account Strategies:** Create, review and innovate your key account strategies each month to build future success.
- **Plan to Plan:** Set up clear call plan objectives and create a call plan for weekly and monthly interactions that are productive and efficient every time.
- **Constant Upskilling:** Maintain a training plan for all introducers ensuring they are experts at what we do and reduce incoming support requests.
- **Social Calendar:** Manage and coordinate introducer entertainment events and promotions. Look for ways of showing we care that other Lenders haven't thought of yet – do something different!
- **Network for Success:** Look for ways of fostering the relationship between lenders and other Avanti staff so they all have opportunities to meet with introducers, fostering stronger relationships, and showing our introducers that we really are People First.

*Integrity, Risk and Compliance*

- Compliance and Risk: Ensure legal adherence and manage risks through operational activity across all teams.
- Integrity First: Uphold high standards in compliance and risk management through adherence to the three lines of defence model.

*Customer Centric*

- Right Docs, On Time: Make sure all introducer / customer facing documents to introducers promptly and efficiently.
- Own the Issues: Take responsibility for resolving customer and introducer queries and problems and see them through to conclusion.
- Be Across the Details: Verify introducer information, ensure records are up to date, know your customer.

*Live Our Values: Relentlessly Helpful, Do What's Right, People First*

- All staff must follow their manager's reasonable instructions and perform additional duties as needed.
- Proactively promote a wellness, health and safety conscious culture at Avanti.

**THE SUCCESSFUL CANDIDATE WILL HAVE:**

- Experience in a similar role preferred with the ability to influence, with confidence in presenting to and networking in groups.
- Knowledge of commercial lending decision making processes, Avanti Group and competitor products, and capability of reading and translating debt servicing & loan documentation and calculations.
- Excellent work ethic and self-motivated, with interests in ongoing personal development.
- Familiarity with regulatory requirements and compliance standards across the financial services industry.
- Willingness to travel domestically as required.
- Numerically competent, attention to detail, with excellent computer skills and the ability to work with CRM systems & the Microsoft suite of products.
- Up to date knowledge of relevant legislation including of the CCCFA.
- Ability to self-manage time and workflow ensuring high levels of communication with all stakeholders. Able to multi-task and work at pace
- Strong spoken and written communication and interpersonal skills, and the ability to constructively manage difficult conversations for a positive outcome when needed.
- Embracing of change and the opportunity change presents, with an adaptable mindset.

THE FOCUS CAPABILITIES THIS ROLE WILL DISPLAY AND BE MEASURED BY ARE:

The focus capabilities for this role are the capabilities someone new to the role should immediately be able to demonstrate competency in. The behavioural indicators provide examples of the types of behaviours that would be expected at that level and are reviewed annually as part of the Group’s Capability Framework.

**Asking questions** means we use active listening, open-ended questioning, framing, reflecting, probing and empathy to ask the right questions at the right time. Our ability to understand the ‘whole’ picture of someone’s narrative is a direct result of the questions we ask.

We believe that cultivating a **positive mindset** involves navigating life’s challenges with grace and resilience. Cultivating a positive mindset not only contributes to personal growth and well-being, but also improves business performance and customer satisfaction.

We believe that the skills needed in **negotiating outcomes** are about providing a platform to establish win-win outcomes for all clients and customers. Our approach to negotiating is to balance firmness with flexibility, using transparency and honesty, and establishing a clear understanding of all aspects of a situation.

Effective **planning** is critical for our success and that of our customers. We set clear goals and objectives, identify the resources we need and develop strategies to overcome potential obstacles. Our planning is at the forefront of being efficient and productive.

**Problem solving** means that we look at problems as opportunities and use all our knowledge and resources to resolve issues quickly and efficiently. We keep our customers and each other informed as we use our problem-solving skills to reach solutions.

The way we present ourselves to each other and our customers is important to us. By maintaining **professionalism** in our approach to our own role and seeks to demonstrate respect, composure and appreciation for others.

Effective **stakeholder management** is shown by understanding our stakeholder needs and priorities to help us coordinate and serve them effectively. As we work with our stakeholders we increase trust, improve our reputation and have better long-term outcomes for our business and theirs.

A deep understanding of our **product knowledge** and services is crucial for delivering exceptional customer service. With extensive product knowledge, we are equipped to provide tailored solutions that meet and exceed the expectations of our clients and customers.



OPERATIONAL DETAIL:

<b>Location</b>	As required by your territory
<b>Department</b>	Auto
<b>Reporting to</b>	National Sales Manager – Auto
<b>Direct reports</b>	This role does not have direct reports.
<b>Internal relationships</b>	All members of the Avanti Finance Group team.
<b>External relationships</b>	Customers, Brokers, Dealers, Introducers.
<b>Document review</b>	Mike Down, GM Auto, June 2024

*I acknowledge that I've read and understand this position description:*

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%%CANDIDATE\_SIGNATURE%%

*Signed by the Employee*