

Role Profile

Role Details

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|--------------------------|---------------------------------|
| Role Title | CUSTOMER SEGMENT MANAGER |
| Range (A-D) | B |
| Business unit | Customer Offer |
| Reporting to | The Head of Customer Management |
| Date produced or updated | June 2008 |

Specific Minimum Requirements for the Job

This section deals with the qualifications, skills and experience needed to be effective in the role. Please list the experience (in terms of knowledge, technical skills and time), and educational qualifications needed for the job.

EXPERIENCE

- Experience in customer management and/or product management with a significant customer focus, ideally in financial services (though retail, telecommunications would be considered)
- Ideally degree qualified or equivalent in a marketing/business discipline

SKILLS

- A customer focussed individual with the drive, commitment and vision to manage customer segments, adding value to all key stakeholders.
- Strong commercial awareness to create and implement solutions
- Ability to understand customer value creation potential and value drivers.
- Has a deep understanding of customer needs and behaviours
- Has an understanding of the financial services regulatory environment
- Strong interpersonal, relationship building and communications skills
- Demonstrated ability to develop relationships and work with third parties to achieve results
- Capable of identifying, evaluating, developing and implementing value adding customer focused offers.
- Analytical Skills- capable of interpreting, understanding and directing our analytical approach
- Budget management- processing and tracking of spend
- Campaign management skill set
- Project management skills would be desirable
- Must be able to travel to operational sites (occasional rather than regular)

Purpose of Role

Please briefly describe the main purpose of the role.

- To work with the Head of Customer Management and Head of Customer Experience to continue development of National Savings and Investments (NS&I) from a product to a customer focused organisation, including management of customer segments, the offer to those segments and the customer experience across all distribution channels.
- To enhance understanding of our customers, by building on the customer segmentation and using that knowledge to tailor offers to meet specific customer needs.
- To create offers that aim to attract and retain customers who are value generating for the business and better manage those that destroy value.

Contribution to NS&I/Value Added

Please indicate how the role contributes to the business of NS&I.

- Developing segment strategies to ensure a sustainable customer base for the future
- Attract, retain and develop target customers by creating relevant offers to meet their

changing needs

- Managing customer segments to meet agreed strategy and annual value and financing assumptions
- Working with partners to modernise the business to make NS&I / SBS more cost efficient.

Core Role

Please show the main areas of responsibility of the role. Break this down into a list of the main tasks undertaken. Where the role has specific areas of accountability and sign-off (e.g. staffing, budget, decision making) this should be clearly stated. (A bullet list is acceptable.)

- Work with the Head of Customer Management to:
 - Develop, refresh and implement customer segment strategies aligned with the overall customer vision and brand values across all current and future distribution channels, along with the contact strategy.
 - To work with Customer insight, engaging agencies and attending focus groups where necessary, to develop our customer knowledge and insight.
 - Work with the & Marketing Communications teams to deliver appropriate and timely offers for key customer segments_
 - Develop and manage a loyalty program to retain our most valuable customers
 - Work with other customer offer, customer insight and marketing teams to develop test and learn plans to build understanding on effective strategies and tactics for managing customer value. With specific responsibilities for managing the campaign deployment meetings, creating campaign briefs, and interpretation and utilisation of post campaign analysis.
 - Work with other customer offer, customer insight and marketing teams to develop briefs for standard campaigns ensuring we fully utilise learning from previous campaigns
 - To specify the data required to improve our knowledge of customers and to work with customer insight and communications teams to acquire the data and assist in evaluation.
 - To work with relevant areas on initiatives e.g. product, channel to ensure customer needs are considered and the initiative is aligned to our customer strategy.
 - To work with Customer Sales and Retention team to develop plans to meet annual remit and financing assumptions.
 - To work with third parties to obtain feedback and ensure the delivery of the customer offer is consistent with the customer strategy and product vision.
- Work with the Head of Customer experience to:
 - To understand and where appropriate challenge all customer touch points across product and sales processes to ensure that all opportunities for enhancements and efficiencies are maximised to enhance the customer experience for key groups.

Competencies and values

Please read in conjunction with the NS&I Competency Framework.

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|---|--------------------|------------|
| Communication and interpersonal skills | Level (1-4) | 3 |
| Please give example: <ul style="list-style-type: none"> o To drive, motivate and direct the immediate team to deliver objectives. o To communicate new customer offers to gain approval and buy in from Customer offer Manager and Head of Customer Offer. o Communicates with both internal and external stakeholders for the effective delivery of key messages. | | |
| Business, customer and stakeholder focus | Level (1-4) | 4 |
| Please give example: <ul style="list-style-type: none"> o Ensuring customers changing needs are reflected in all projects and business developments o Work to educate key business stakeholders to become customer focus and recognise long term value. | | |
| Partnership and relationship working | Level (1-4) | 3 |
| Please give example: <ul style="list-style-type: none"> o Ensures key projects have clear objectives and reflect both customer and business strategy. o Raises contentious issues that need to be resolved in order to identify win-win outcomes | | |
| Leadership and team-working | Level (1-4) | 3 |
| Please give example: <ul style="list-style-type: none"> o Builds on relationships across the business, implementing joint programmes to deliver win-win results o Assists others to deliver and works effectively within cross functional teams to help ensure corporate goals are achieved | | |
| Planning and organising to deliver results | Level (1-4) | 3 |
| Please give example: <ul style="list-style-type: none"> o Assisting in the development of new customer offers with partners within corporate objectives o Helps to develop, refresh and co-ordinate implementation of customer segment strategies. | | |
| Applying knowledge and skills | Level (1-4) | 3/4 |
| Please give example: <ul style="list-style-type: none"> o Demonstrating a deep understanding of customer needs and market conditions in recommendations of new offers for customers, using insight from the marketing customer knowledge team to make recommendations. o Develops offers and propositions to attract and retain customers who are value generating from the business and better manage those that are value destroying. | | |
| Changing for the better | Level (1-4) | 3 |
| Please give example: <ul style="list-style-type: none"> o Strong market and customer focus to identify new opportunities for customer segment, channel and products to optimise cross business benefits. o Challenges all customer touch points across product and sales processes to ensure that all opportunities for enhancements and efficiencies are maximised to enhance the customer experience for key groups. | | |
| Problem solving and decision making | Level (1-4) | 3 |
| Please give example: <ul style="list-style-type: none"> o Capable of interpreting and evaluating value adding customer offers, able to resolve any issues surrounding these and consider impact on others. o Generates innovative but practical solutions to a range of challenges, encourages others to be creative. | | |

- Evaluates the pros and cons of proposed solutions to agree on best way forward

Performance Measures

Please list the outputs of the role which will indicate success.

- Achievement of value add target and financing assumption for products/segments
- Development an implementation of customer segment plans
- Continue to improve knowledge of customers
- Design and delivery of customer experience for all contact points in the customer journey e.g. for sales, cross sales, information supply service for own product portfolio.

Relationships

Please list the jobs and areas with which the post interacts. This should show internal and external relationships.

| Internal | External |
|---|--|
| All NS&I business units and directorates at all levels. Executive Management (EMT) | Customers Post Office SBS – development, Senior Management Team and operational levels Agencies Appointed Consultants Third Party Representatives |