

# Innovation Services Customer Navigator

---

## Kaupapa | Purpose

The role of the Innovation Services Customer Navigator is to work directly with Waikato-based businesses and support their growth and success.

You will provide ecosystem navigation, connections and networking opportunities to businesses, creating actions plans to support business growth, and facilitating access to SODA, MBIE, and other business growth services as appropriate.

The Innovation Services Customer Navigator role is also responsible for undertaking specified projects related to start-up and SME business growth development as required.

### 1. Customer Support and Innovation Services Expertise:

- Lead the customer experience for all inquiries for Innovation Services to understand needs and create tailored action plans.
- This role is responsible for actively identifying, managing and supporting innovative businesses and assist R&D and technically focused businesses in navigating support available in the ecosystem.
- Provide business support to assist business development and capability needs. This includes the triaging of business customer inquiries, management of the connectivity and referral to external suppliers and ensuring all inquiries receive timely and appropriate business support.

### 2. Regional Business Ecosystem Development:

- Drive inspiration, awareness, and engagement of Soda and Innovation Services across the business network through conferences, events, workshops and Soda programme delivery.
- Proactively build strong partnerships with Regional councils and economic development providers in the Waikato region so they understand the Soda, and innovation support available.
- Identify and proactively build strong relationships with business growth and management development providers in the Waikato region. Ensure they understand the Soda, Innovation Services and the RBP programme offering and its parameters so they can inform clients and actively refer businesses to Soda for support.

### 3. Relationship Management:

- Build effective internal and external relationships on behalf of Soda and MBIE across the Waikato region. This includes but is not limited to businesses, economic development agencies regional councils, industry associations, government organisations, universities and capability providers.

**Reports to:** General Manager

**Remuneration:**

**Date:**

---

## Ngā mahi | Do

### Customer Support and Account Management

- Own Innovation Services inbound business new enquiries, triaging and navigating customers to the products they need.
- Lead engagement and relationships with both existing and prospective customers.
- Provide appropriate business support and manage an active portfolio of businesses and individuals to assist with their business development and capability needs – including identifying enterprises that may be eligible for Soda, MBIE or Regional Business Partner Network services. Active engagement typically includes:
  - A Discovery Session with a Customer Navigator to understand the business and identify needs
  - An Action Plan outlining recommended next steps and support options
  - A follow-up (e.g. email check-in) to support progress where appropriate
- Lead innovation discovery workshop sessions and develop action plans with customers.
- Connect customers to relevant customer engagement and/or product delivery teams in Soda and MBIE based on qualified needs.
- Lead engagement with local service providers, mentors, and experts to build out referral network
- Own documentation of customer interactions in Soda HubSpot CRM and MBIE CRM
- Attend MBIE planning and training days for continued development, learning and sharing.

## **Regional business ecosystem development**

- Build strategic relationships with Waikato University, Wintec, KiwiNet, Return on Science, and other new PRO's.
- Promote growth of the innovation community in the Waikato region, bring customers together, host events.
- Represent Soda at speaking engagements, workshops and conferences to raise the profile, awareness and engagement of businesses into Soda and MBIE programmes and services.
- Promote growth of the Waikato business led R&D and applied innovation community by bringing the ecosystem together through hosting Soda events, and promotion of MBIE national and regional events.
- Prepare, promote and deliver Soda programmes in the Waikato. This may include the facilitation or co-facilitation of Soda workshops (SME and Start-up programmes); facilitation of business training events and initiatives; support accelerator programmes; business showcase events.

## **Relationship Management**

- Builds and maintains positive working relationships with internal and external stakeholders.
- Actively monitors the achievement of KPIs set by MBIE to ensure expectations are met or exceeded. This includes the drafting of the necessary quarterly report for MBIE, a contractual obligation to this stakeholder. This report would be reviewed and approved by General Manager before it is submission.
- Works well as part of the immediate and the wider team and is supportive and respectful of other team members.
- Consults and collaborates with others as appropriate.
- Represents Soda in a professional and diplomatic manner.
- Demonstrates cultural and political awareness.
- Lead engagement with local service providers, mentors, and experts to build out referral network.
- Own documentation of customer interactions in Soda HubSpot CRM and MBIE CRM.
- Attend MBIE planning and training days for continued development, learning and sharing.
- Meet regularly with the Navigators and other MBIE team members to ensure you are up to date with latest information available for existing and potential clients.

## **Problem Solving**

- Looks for opportunities to make improvements and add value.
- Works cooperatively with others to develop innovative solutions.
- Demonstrates creativity and innovation when assessing problems and developing solutions. Analyses relevant information in a rational manner to form evidence-based judgements.
- Demonstrates a solutions-based approach to overcoming problems in a positive and constructive manner.
- Open to feedback and seeks out personal opportunities to learn and grow.
- Support the General Manager to identify key opportunities to improve processes and streamline efficiencies within the Soda CRM and business discovery process.

## **Operational excellence and communication**

- Support the creation and improvement of the Soda operational processes to streamline efficiencies and project plans.
- Support the ongoing development of business growth support materials to improve and grow Soda's resource library (self-help guides and training material, business checklists and guides).
- Demonstrates knowledge and understanding of the regional, national and international context that SODA operates within.
- Understands the strategic goals of SODA and what these mean at an operational level.
- Contribution to Soda related strategy and planning discussions.
- Proactively plans and takes appropriate action to achieve goals
  - Prioritises competing demands without compromising the quality of work delivered
  - Demonstrates effective project management skills
  - Demonstrates effective time management skills
- Is confident communicating clearly and persuasively to a range of audiences.
- Employs the most appropriate method/medium of communication to reach the desired audience.

## **Health and safety management accountabilities are understood and applied. Individual and staff H&S outcome and objectives**

- Significant hazards in the area of responsibility are identified, documented and reviewed annually or as new hazards emerge
- Significant hazards are eliminated, isolated and/or risk minimized
- Staff in the area of responsibility are involved in the hazard management

## **SODA culture**

- Represents and supports Soda purpose, strategic outcomes and values
- Currency with, and understanding and commitment to Soda’s purpose, focus, spirit, attributes & beliefs is demonstrated
- Abide by all Soda policies and procedures
- An understanding and commitment to the principles of the Treaty of Waitangi and Equal Opportunities (EEO) is demonstrated
- Equity and diversity in the workplace, building mutual trust, and treating staff equitably, transparently, fairly and in a culturally appropriate manner is promoted
- Continuous improvement and development of systems, procedures and service to ensure Soda maintains and develops its position

#### **Other duties**

- Performs other duties as may be reasonably required from time to time

## **Pūkenga | Have**

#### **Education/training**

- Tertiary graduate level education (Bachelor’s)
- Post graduate qualification preferred.

#### **Experience**

- 3-5+ years’ experience in roles that included responsibilities such as:
  - Provision of business growth support and ecosystem navigation to Startup, SME and Innovative businesses.
  - Customer engagement, relationship management, or business development within a professional services environment.
  - External stakeholder relationship and account management.
- Experience working with Startups, SME’s or innovation focussed businesses with the ability to understand different stages of business growth and appropriate support pathways
- An understanding of the New Zealand innovation ecosystem, including government support mechanisms (R&D Funding, RBP, NZTE) is desirable.
- Exposure to Research and Development; or Innovation or Commercialisation environments is beneficial

#### **Typical knowledge, skills and attributes**

- Having the skill to combine customer relationship management skills with action oriented and process driven task management. Thrive on engaging with customers, uncovering their business needs, and connecting them to the right service offering based on their specific needs.
- Ability to demonstrate an understanding of business strategy and planning processes and therefore skilled in assessing and analysing business performance from a range of industries; stage/status of business cycle.
- Understanding of business ecosystems and growth drivers including familiarity with incubators, accelerators and government programmes.
- Exposure to R&D and Innovation projects and industry environments where they are applied.
- Awareness of and interest in emerging trends and technologies.
- Knowledge of local and regional professional service providers, NZTE, MBIE and Business Mentors NZ.
- Demonstrated ability to prioritise, co-ordinate and effectively manage your time to achieve operational objectives and KPIs.
- Highly developed interpersonal, communication and relationship skills.
- Strong client-centric orientation, focused on client management, relationship skills and teamwork.
- A strategic approach to customer management with a desire to build and maintain relationships.
- Able to thrive in an agile environment that is fast paced changing environment.
- Works autonomously with little to no daily direction and uses initiative and has attention to pertinent detail.
- High standard of communication skills and ability to relate to people across all levels, enterprise sizes, sectors and maturity.

---

## SODA Values

### Be Exceptional

- Provide exceptional customer service, every time
- Anticipate customers' needs and exceed expectations
- Make decisions with a customer-centric lens

### Be Brave

- Always strive for excellence and continuous improvement
- Embrace failure as a learning opportunity, test ideas and make tough decisions
- Encourage risk-taking and creativity

### Be Better

- Continuously improve and learn, seek new and better ways of doing things

- Reflect on performance and get feedback to push boundaries and achieve better outcomes
  - Create more value and improve outcomes for our customers and stakeholders
- 

## Ngā Hononga Mahi | Working relationships

### Internal:

- SODA Staff
- SODA Clients
- SODA Business Growth Advisors
- SODA Innovation Specialists
- SODA Expert Advisors
- SODA Mentors
- Board of Directors
- Shareholders & Stakeholders

### External:

- Corporate & Strategic Partners
- Corporate & Strategic Sponsors
- Government Funding Agencies
- Service Providers
- Economic Development Agencies
- Regional Councils
- Regional & National Business Leaders
- Visitors
- Contractors
- Suppliers
- Potential Clients

### Resource delegations and responsibilities:

#### Financial:

People: No