



HERITAGE LIFECARE

# *Position Description*

## **Village Customer Specialist**

### **Company Overview:**

Heritage Lifecare Limited is a provider of Residential Aged Care Facilities throughout New Zealand. We take pride in the value we add to the lives of all those who reside in our facilities. Our employees are united in our common purpose, mission and values and strive to ensure the delivery of respectful and caring services, in an environment that is safe for clients. Heritage aims to enable the continued pursuit of excellence in care through monitoring, auditing, actioning and evaluation of service whilst respecting and valuing our residents, families and staff.

As an organisation we are committed to providing 'A Better Everyday' for our residents, their whānau and friends, and our employees by aligning our actions to our company values:

- **People First - Kia tika te rere o te waka**  
Enhance the health, safety, and wellbeing of our people
- **Nurturing Success - Poipoia te angitu**  
Seize opportunities and experiences every day in every moment
- **Better Together - He toa takitini**  
Work together in respect and harmony to empower everyone

At Heritage Lifecare Limited we are committed to embracing diversity by ensuring we apply the principles of merit, equality, fairness, and transparency to our working practices which enable decisions and actions to be free from discrimination, conflict of interest and favouritism. We do this with a commitment to the Principles of Te Tiriti o Waitangi – partnership, participation, and protection.

Heritage Lifecare is committed to Ngā Paerewa Health and Disability Services Standards, supporting a person and whānau-centred health and disability service, where people are empowered to make decisions about their own care and support in order to achieve their goals.

## Position Overview:

This position is responsible for selling Heritage Lifecare's village services and products, being active in local communities to engage with prospective residents and their families to generate leads and convert to sales. The role has a crucial focus on meeting and exceeding village sales targets.

Customer service and engagement is an important part of the role with both potential and existing residents, fostering trust and improving satisfaction.

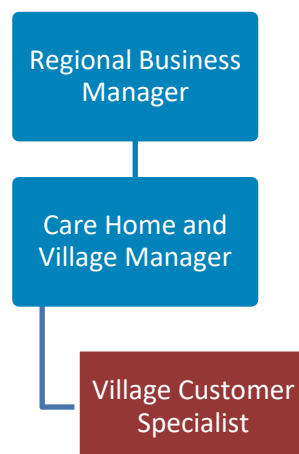
The role organises the daily operational management of the retirement village; ensuring our residents live in a vibrant, well-run village community, and any vacancies are filled quickly with new residents.

**Reports to:** Care Home & Village Manager

## Functional Relationships:

- Regional Business Manager
- Regional Sales Manager
- Head of Customer Experience
- Support Office Team (e.g. Marketing, Finance). Group Village Administrator.
- Village and Care Home Team, including activities, clinical, maintenance and administration
- Community Contacts and Health Professionals for referrals e.g. aged concern
- Residents, their families/whānau
- Tradespeople and suppliers

## Team Structure:



## Key Accountabilities:

Responsibility	Description
Sale of Product and Services	<ul style="list-style-type: none"> <li>Proactively promote our villages and care homes in the local communities through building relationships with key stakeholders who play an important role in the decision process, such as health agencies and local lawyers. Present at local clubs and organisation, such as Rotary or Outdoor Bowling Clubs.</li> <li>Be a brand ambassador for Heritage and reflect our values.</li> <li>Sell all available vacant village units, care options and care suites within agreed timeframes to ensure our villages and care homes are occupied and vibrant.</li> <li>Achieve and exceed all agreed sales KPIs.</li> <li>Manage the turnover of units, care rooms and care suites to ensure they are available as soon as possible, promoted and sold within agreed timeframes.</li> <li>Manage the refurbishment process.</li> <li>Manage the sales process from end to end, from lead generation to enquiry management, to conversion of the sale, using our Heritage resources.</li> <li>Work with all key stakeholders to ensure they are able to complete their tasks to ensure a successful sales process.</li> <li>Be available for visits from potential residents and their families, including Open Homes at weekends.</li> <li>Work with the Care Home &amp; Village Manager and Sales &amp; Marketing team to create events to attract potential residents and their families to the care homes and villages to view the units and care suites and generate leads.</li> </ul>
Village Operations	<ul style="list-style-type: none"> <li>Provide a schedule of events and activities, in coordination with the residents and the Care Home activities team.</li> <li>Ensure that regular socialisation opportunities are available and encourage participation.</li> <li>Meet regularly with the Resident's Committee.</li> <li>Coordination of annual AGMs.</li> <li>Provide appropriate support for residents as required.</li> <li>Investigate opportunities to offer 'added value packs' to promote engagement and welfare of the residents.</li> <li>Create a regular monthly newsletter for residents and potential new residents to keep them informed</li> <li>Manage all feedback in accordance with policy to ensure all concerns are addressed in a timely manner.</li> </ul>
First Impressions	<ul style="list-style-type: none"> <li>Ensure the units are refurbished within agreed timeframes and we have staged units available for showing prospective residents and their families.</li> <li>Ensure the village communal areas are well maintained and tidy.</li> <li>Work with the property team and on-site maintenance to ensure the maintenance schedule is up-to-date to enhance first impressions.</li> </ul>
Competitor information and product marketing	<ul style="list-style-type: none"> <li>Understand our competitors' offerings and leverage our point of difference.</li> </ul>

	<ul style="list-style-type: none"> <li>• Ensure marketing collateral is available and work with the marketing to develop any new material required.</li> <li>• Ensure local marketing plans are in place and are being followed.</li> <li>• Provide information to Marketing and the Regional Sales Manager about price shifts and market trends</li> </ul>
Reporting & Administration	<ul style="list-style-type: none"> <li>• Provide weekly reporting to the Care Home &amp; Village Manager and Regional Sales Manager</li> <li>• Assist the Care Home &amp; Village Manager by ensuring all relevant documentation is sent to Support Office in agreed timeframes</li> <li>• Assist with the completion of all sales documentation for selling units, care suites and apartments.</li> <li>• Provide assistance to the Care Home and Village Manager following a request to terminate a LTO (Licence to Occupy) by: <ul style="list-style-type: none"> <li>○ Ensuring the Termination documentation is forwarded immediately to Support Office</li> <li>○ A Vacated Unit inspection is completed</li> <li>○ In conjunction with the care Home and Village Manager, engage and coordinate trades for approved work to the vacant unit</li> </ul> </li> <li>• Take minutes for meetings, such as resident meetings and AGMs.</li> </ul>
Relationship Management	<ul style="list-style-type: none"> <li>• Build collaborative relationships with key stakeholders to enhance the sales process and achieve KPIs.</li> <li>• Network and develop relationships in the local community and relevant agencies to improve lead generation.</li> <li>• Foster good relationships with our residents and their friends and family. Ensure regular meetings are occurring and everyone is provided with the opportunity to raise feedback for continuous improvement.</li> <li>• Meet regularly with your Care Home Manager, Regional Sales Manager and all relevant key stakeholders.</li> </ul>

## Health and Safety

Heritage Lifecare is committed to a process of continuous improvement in order to achieve excellence in the management of health and safety at all of our workplaces. We recognise the positive impact that the values and benefits of enhanced health and safety bring to the organisation, our employees and our communities. There are two key points to health and safety:

- The safety of our people and the communities in which we operate always comes first
- We are all empowered and expected to challenge any unsafe situation at work

We will achieve these by:

- Ensuring Village Security processes are followed
- Building a positive health and safety culture
- Aiming for zero harm
- Taking reasonable practicable steps to identify, eliminate or minimise risk
- Reporting hazards and incidents
- Managing contractors
- Communicating and consulting regularly about health and safety issues
- Developing our knowledge about our roles in managing health and safety
- Investigating and learning from incidents
- Ensuring competence to do the job

## Core Competencies

<b>Sales</b>	Shows extremely high levels of self-motivation and is perpetually finding ways to engage with prospective new residents and families to meet and exceed sales KPIs. Is well presented and has exceptional communication and relationship building skills. Is reliable, flexible and a self-starter, with the initiative to deal with different situations to convert a lead to a sale. Is nurturing and able to share knowledge of best practice to ensure other staff members are engaged and support the sales process, improving first impressions and conversion from lead to sales. Has a proven track record of selling.
<b>Trusted Partner</b>	Values and builds long term relationships in the village and community. Develops and maintains credibility and is genuinely passionate and enthusiastic whilst maintaining authenticity.
<b>Driving for Results</b>	Setting high goals for personal and group accomplishment; using measurement methods to monitor progress toward goals; tenaciously working to meet or exceed goals while deriving satisfaction from that achievement and continuous improvement. Achieves and exceeds all sales KPIs.
<b>Customer Focus</b>	Builds customer confidence and trust. Is committed to increasing customer satisfaction and providing exceptional customer service. Assumes responsibility for all feedback, solving concerns.
<b>Process Improvement</b>	Looks for incremental improvements in work processes and results, looks for ways to streamline work processes, reduce rework, and improve quality and customers offering.
<b>Thought Leadership</b>	Using your knowledge of your business environment, use past experiences, relevant literature, best practise, marketing leading approaches and unconventional results which have driven success, come up with winning ideas, and create innovative solutions to solve existing and new business challenges.
<b>Courage</b>	Display professional courage by seeking feedback and listening, say what really needs to be said in a professional manner, communicate openly and frequently, embrace change, make decisions and move forward, give credit to others and hold yourself and where appropriate others accountable.
<b>Transfer skills to Business</b>	Is able to learn from past experiences across a variety of different industries, organisations and circumstances and can appropriately identifies transferable skills for their current role/ project / situation to add value and achieve a positive outcome for the business.
<b>Facilitating Change</b>	Encouraging others to seek opportunities for different and innovative approaches to addressing problems and opportunities; facilitating the implementation and acceptance of change within the workplace.

*The intent of this position description is to provide a representative summary of the major duties and responsibilities, and the competencies expected to be performed by employees in this job classification. Employees may be requested to perform job related tasks other than those specified in this Position Description.*