

POSITION PROFILE

1. POSITION IDENTIFICATION

POSITION TITLE:	<u>Assistant Product Manager</u>		
POSITION No:	<u></u>	COST CENTRE:	<u></u>
DIVISION:	<u>Marketing</u>	SECTION:	<u>Product</u>
LOCATION:	<u></u>	REPORTS TO:	<u>Product Manager</u>
INCUMBENT:	<u></u>	DATE:	<u>28/06/02</u>

2. POSITION FUNCTION

Briefly describe the major purpose and function of the position
<u>Assistant to the Product Managers in Perth</u>
<u>Administer Due Diligence process for brochure roll over</u>
<u>Manage relationships & supply of information to research houses</u>
<u>Maintain competitor library</u>
<u>Support Product Managers in preparation of the D3 process for new product initiatives & enhancements</u>

3. MANAGEMENT RESPONSIBILITY

Describe the function and composition of the team the position is responsible for managing.
<u>NA</u>

4. PRINCIPLE RESPONSIBILITIES

List the major responsibility statements describing the end results for the position.
<u>1. Assist the Product Managers in performing their day to day functions, so that they can effectively undertake their functions. These duties, as defined by the particular Product Manager, could include product design, offer document preparation, profitability analysis and project management, and other matters as requested.</u>
<u>2. Prepare competitor research on product and competitors. Monitor research via media and other sources, so that the competitor library is maintained and competitor information is up to date.</u>
<u>3. Collect and present data concerning product performance in terms of sales, retention and profitability on a monthly basis to the Product Management team.</u>
<u>4. Respond to Industry Surveys</u>
<u>5. Manage database of SGB Referrals [Small Business]</u>
<u>6. Manage Administration of Due Diligence process for Brochure roll-overs</u>

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| 7. | <u>Assist in completing D3's for Product Managers</u> |
| 8. | <u>Completion of WIP & organisation for weekly product meetings</u> |
| 9. | <u>Support preparation of D3 for new product initiatives and enhancements</u> |
| 10. | <u>Maintain adviser idea file [Fact File]</u> |

5. KNOWLEDGE & SKILL REQUIREMENTS

List the key areas of knowledge required to do the job competently (i.e. what the incumbent needs to know).

The position requires knowledge of:

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|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | <u>An understanding of the legislative/technical rules concerning financial service products, and the rollover of prospectus documentation is desirable.</u> |
| 2. | <u>An understanding of the financial services industry, including the role of financial planners, is desirable.</u> |
| 3. | <u>Good project management skills</u> |

Please list the skills and abilities that are required to do the job competently (i.e. what the incumbent must be able to do).

The position requires skill or ability in:

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|----|----------------------------------|
| 1. | <u>Written communication</u> |
| 2. | <u>Time management</u> |
| 3. | <u>Project management skills</u> |
| 4. | <u>Presentation Skills</u> |

6. EXPERIENCE, QUALIFICATIONS AND TRAINING

- (a) What type and level of practical experience is required to do the job competently?

Existing financial services experience in an operations, marketing, sales or customer service role would be desirable

- (b) What secondary or tertiary education is essential/desirable to do the job effectively, (e.g. Year 12, TAFE Certificate, Diploma, Degree, PostGraduate)? In what type of specialisation?

A tertiary qualification, preferably in Marketing or Economics

Currently undertaking of industry post-graduate qualification is highly desirable

- (c) What other type of training, formal and informal is required to fulfil the responsibilities of the position?

Knowledge in MS Outlook, Schedule, Word, Powerpoint, Excel and internet based technologies

7. COMMUNICATION REQUIREMENTS

List examples of the key internal and external relationships that the position is required to establish and maintain.	
(a) External	Purpose and nature of relationship
<u>Customers</u>	<u>Assist in product inquiries</u>
<u>Service providers</u>	<u>Liase as required</u>
(b) Internal	
<u>Sales staff</u>	<u>Gather market knowledge</u>
<u>IT, Ops, Finance staff</u>	<u>Liase in order to build products/enhancements through a common understanding of the task</u>
<u>Customer Service</u>	<u>Assist in training</u>

8. PROBLEM SOLVING & DECISION MAKING

(a)	List examples of the typical decisions or recommendations the position is required to make.
	<u>How to best allocate time in light of competing requests from Product Managers</u>
	<u>Recommendations as to actions to be taken in light of product statistics or competitor activity</u>
(b)	List examples of the rules, guidelines, standards or procedures that support the position making these decisions or recommendations.
	<u>Due diligence files for prospectus roll's</u>
	<u>Competitor library</u>
(c)	If the position encounters a problem which cannot be solved where is advice sought?
	<u>Product Manager</u>
(d)	In what type of situations does the position need someone's approval before a decision can be taken to overcome problems?
	<u>Where there are unresolved product management issues.</u>