

The logo for Summerland Bank, featuring a stylized orange 'S' symbol followed by the text 'Summerland Bank' in a bold, orange, sans-serif font.

**Summerland  
Bank**



Summerland  
Bank

**Want to work  
at Summerland?  
Join our team!**

Certified  
**B**  
Corporation

# Want to work at Summerland? Great choice!

As a customer owned organisation, we're not like a major bank, as our profits don't go to external shareholders. We're defined by our mutuality, which means we're owned by our customers, run by our customers, and everything we do is for the ultimate benefit of our customers.

## Our Purpose

why we are here

**Better banking,  
stronger  
communities**

## Our Vision

what we want to achieve

**To be Australia's  
most successful  
customer-owned  
bank**

## Our Values



Default to  
positivity



Be brave



People  
matter most



Make  
others proud



Keep it  
simple

## A local, sustainable kind of banking - one with your best interests at heart

Summerland has a long history of integrating sustainability practices into our business. We exist for the benefit of our customers and the communities we serve. Our Environmental, Social and Governance principles ensure we maintain a focus on good practices, while supporting our customers and communities. benefit of our customers.



**KINCENTRIC**  
**Best Employers**

AUSTRALIA 2022

## Giving back to our community

We strive to support a wide range of community groups with:

- Community sponsorships
- Community accounts
- Reduced rate for Eco Loans
- Staff paid Volunteer Day

## People matter most

Our people are considered our greatest asset and key differentiator. It's good business to enable our people to thrive with great training and coaching support.

Respectful relationships provide a strong foundation for our workplace culture; expressing the way we do business with our customers.

It's one of the reasons we have been awarded Kincentric Employer of the Year, for three consecutive years.

## What Summerland offers you

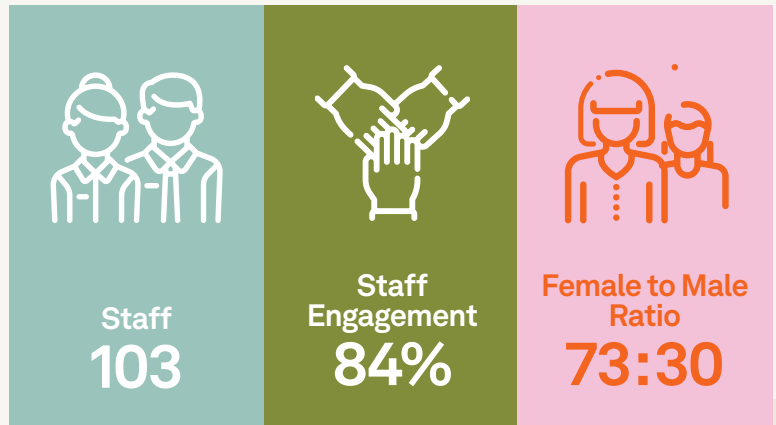
- Above award wages
- Training and career development
- Flexible working conditions
- Concessional interest rates
- Staff fee exemptions
- Modern working environment
- A uniform allowance
- Professional success with a community focus
- Employee Assistance Program: wellbeing for staff and their families
- Lots of fun, we have great staff social events
- Opportunity for career breaks to do the things you love
- An opportunity to remain in a vibrant community without having to relocate
- An awesome place to work!

## Learning and Development

At Summerland, you will not just be doing a job, you can also build a career.

We are committed to providing learning and development opportunities for you to thrive:

- Induction and orientation (comprehensive 6 month program)
- Traineeships in various certificates eg: Financial Services, Business, Accounting
- On-going products and systems training
- Easy to understand compliance requirements via our online learning platform
- Leadership, management, mentoring and coaching skills
- People and Culture portal to manage all your career needs



## Local branches across the beautiful Northern Rivers

Employing over 100 staff with branches stretching from Grafton to The Pines at Elanora and Head Office in Lismore, Summerland is one of the largest locally owned and operated businesses in the region offering a wide variety of careers across customer services and business support, including:

- Contact Centre Services
- Banking Advisors
- Banking Specialists
- Lending Specialists
- Loans Support
- Credit
- Payments Processing
- Systems Analysts
- Business Analysts
- Finance
- Information Technology
- Legal/Compliance
- Marketing
- Executive Assistants



## Branch Leader

### Purpose

Welcome to Summerland Bank, where banking meets community values.

We are a customer-owned bank and a certified B Corporation, dedicated to serving the residents of a vibrant regional area in Australia. At Summerland Bank, we prioritise the well-being of our customers and our environment, ensuring that every financial decision we make aligns with our commitment to social and environmental responsibility. As we continue to grow, we are seeking passionate individuals who share our vision and want to contribute to the positive impact we make in our community. Our multi-award-winning transformational culture is how we sustainably succeed in serving regional communities for over 60 years.

Join us and become part of a team that values integrity, sustainability, and the power of banking for good to deliver on our purpose: Better Banking, Stronger Communities.

### Overview

The Branch Leader is an integral part of the retail growth and customer experience team who maximises relationships through providing banking solutions that meet customer needs with exceptional customer experience. You generate a lasting brand impression positioning Summerland as the preferred principal financial services provider. Your role as Branch Leader adds values through leadership of the branch team, coaching, and developing our people to achieve growth and exceptional customer service. You are responsible for personal lending results and ability to contribute to home loan results. You hold primary responsibility for all aspects of branch performance including actively growing people and business within your existing customer base and from external sources.

As an information asset owner, be responsible for identifying risks, implementing, and testing of controls on those information assets, performing risk assessments, maintaining, and testing recovery plans for any business interruptions or data breach events, including Vendor risk management for applicable third parties, that are supplying, holding, transmitting, or accessing our information assets.

You bring an engaging, innovative leadership style to create authentic relationships that maximise the performance potential of people. You consistently role model our values to represent an attractive and memorable brand that people want to be a part of, delivering an impactful customer experience that leads to enduring relationships. You use your leadership and service experience to maximise the potential of teams to grow our customer base and brand awareness.

As an ambassador of the Summerland brand, you bring new customers and enrich existing relationships. You understand how your role delivers the Summerland vision and mission and can articulate the value you add with relevance to customers.

You are committed to personal growth, act with integrity and accountability, have fun along the way, and celebrate success as one team. You thrive in a performance culture, do not shy away from challenges, act with agility, adaptability and have the will to succeed.

You ooze passion and confidence to demonstrate ease in developing relationships with customers, teams, and partners. You are open to new ideas, seize opportunities, and deliver simple, sustainable solutions.

### Our Ideal Match

- Conduct that aligns with our purpose, vision and values
- Understanding of financial services regulations, guidelines, products (CIV in FS desirable)
- Exceptional communication and interpersonal ability to develop rapport quickly with diverse stakeholders.
- Successful leadership and coaching experience to maximise the performance potential of teams
- Strong relationship building skills including business development acumen
- Ability to self-regulate for consistent quality interactions and positive outcomes
- Ability to self-manage to meet performance expectations and deadlines
- Professional personal presentation, negotiation, and decision-making agility
- Understanding of the key responsibilities of the role with the ability to make a difference to our customers and business
- Critical thinking ability to respond quickly to customer needs with meaning and purpose
- An aptitude for technology and learning new programs, systems, and processes
- A demonstrated passion for self-development and a 'can do' attitude
- A current motor vehicle licence and the ability to travel to a variety of locations

Whilst preferred, it is not essential for you to have a background in banking as we can teach the successful candidate all they need to know. What is most important is your commitment to genuine and meaningful conversations and the ability to generate business from internal and external sources.

## Accurate Role Description

<p><b>Department /Team:</b> Branch Network</p> <p><b>Vision:</b> To be Australia's most successful customer owned bank</p> <p><b>Purpose of Position:</b> Perform the duties of Branch Leader by providing positive and comprehensive leadership to the Branch team, coaching and developing direct reports, managing the sales process, and undertaking business development.</p>
--

Responsibility	Skill	Demonstrated Behaviour
<p>Communicate Role Clarity and Apply Accountability</p>	<ul style="list-style-type: none"> <li>Set clear and consistent expectations regarding performance and behaviours.</li> <li>Embed expectations by role modelling and demonstrating consistent positive performance and behaviour.</li> </ul>	<p><b>Role Clarity and Accountability</b></p> <ul style="list-style-type: none"> <li>Communicate to each team member accountability of the Accurate Role Description (ARD)</li> </ul> <p><b>Reporting</b></p> <ul style="list-style-type: none"> <li>Produce reports to provide appropriate documentation to support role clarity and application of accountability.</li> </ul> <p><b>Direction and Support</b></p> <ul style="list-style-type: none"> <li>Provide clear direction and support by being a visible presence in the branch, being available and approachable to all team members.</li> <li>Provide regular feedback to team by proactively seeking out opportunities to build effective relationships.</li> </ul>
<p>Manage Motivation (Will)</p>	<ul style="list-style-type: none"> <li>Determine and proactively support motivational drivers for each team member.</li> <li>Identify and reframe limiting beliefs</li> </ul>	<p><b>Team Culture</b></p> <ul style="list-style-type: none"> <li>Consistently role model the ability to demonstrate a positive attitude.</li> <li>Demonstrate enthusiasm to influence the team to achieve desired outcomes.</li> </ul> <p><b>Team Motivation</b></p> <ul style="list-style-type: none"> <li>Establish and maintain high levels of morale in branch.</li> <li>Maintain team motivation by proactively addressing poor behaviour in a timely manner.</li> </ul> <p><b>Team Recognition</b></p> <ul style="list-style-type: none"> <li>Demonstrate appropriate and timely praise and recognition where the team or an individual exceeds expectations or reaches a set milestone.</li> </ul>

		<p><b>Team Support</b></p> <p>Demonstrate flexibility when providing support to the team in line with branch rostering requirements and customer needs, as well as when providing support across the organisation as directed.</p>
Manage Ability (Skill)	<ul style="list-style-type: none"> <li>• Manage leadership and engagement effectiveness.</li> <li>• Proactively develop team strength.</li> </ul>	<p><b>Coaching and Development</b></p> <ul style="list-style-type: none"> <li>• Implement regular coaching and development of team members through fortnightly observations, structured fortnightly 1:1's and other available development tools.</li> </ul> <p><b>Team Skill Development</b></p> <ul style="list-style-type: none"> <li>• Monitor level of technical skill and product knowledge and actively upskill the team as required, in conjunction with Sales Enablement Manager.</li> <li>• Provide targeted support to new team members including onboarding and induction.</li> </ul> <p><b>Team Career Development</b></p> <ul style="list-style-type: none"> <li>• Engage with each team member to understand individual career goals.</li> <li>• Ensure all team members have a documented Development Plan as well as coaching plan utilising the GROW Coaching Template.</li> </ul>
Manage Performance	<ul style="list-style-type: none"> <li>• Track performance against agreed KPI's (sales and service results)</li> <li>• Adhere to ARD agreed priorities.</li> <li>• Implement performance planning and review process.</li> <li>• Address any staff related performance issues.</li> </ul>	<p><b>Performance Management</b></p> <ul style="list-style-type: none"> <li>• Manage identified performance issues in a timely manner, and where necessary seek support from People and Culture.</li> <li>• Record accurate diary notes and make available to People and Culture to support performance management.</li> </ul> <p><b>Sales Management</b></p> <ul style="list-style-type: none"> <li>• Set clear sales performance expectations for branch.</li> <li>• Role model effective customer service and sales process behaviour when interacting with customers.</li> <li>• Conduct daily management of the Sales Vision board, through effective AM and PM debriefs.</li> <li>• Ensure all team members are aware of branch expectations and required sales performance</li> <li>• Develop and track progress of 90-day plans.</li> </ul>



		<p><b>Compliance and Audit</b></p> <ul style="list-style-type: none"> <li>• Manage all branch compliance requirements.</li> <li>• Score satisfactory or higher on all Branch Audit Reports.</li> </ul> <p><b>e-Learning Compliance</b></p> <ul style="list-style-type: none"> <li>• Monitor progress and manage each team members progress of Nexus People compliance e-Learning module completion.</li> </ul>
<p>Personal and Stakeholder Management</p>	<ul style="list-style-type: none"> <li>• Perform in a manner to ensure effective delivery of operation through stakeholder management.</li> <li>• <b>Business Partner Management:</b> identify and develop relationships with key partners to better deliver performance requirements.</li> <li>• <b>Business Development Manager:</b> actively undertake business development with the objective of generating lending, deposit, customer growth and other business sources for the branch.</li> <li>• Build relationships across the organisation.</li> <li>• Demonstrate use of effective time management skills by planning, effective diary management, and completion of priorities as agreed.</li> </ul>	<p><b>Branch Lending</b></p> <ul style="list-style-type: none"> <li>• Support Lending Specialists and BDM's by actively generating lending pipelines through business development and CNC's.</li> <li>• Manage and drive success of branch personal lending pipeline.</li> </ul> <p><b>Stakeholder Management</b></p> <ul style="list-style-type: none"> <li>• Establish and maintain professional and productive working relationships with all internal and external stakeholders.</li> </ul> <p><b>Community</b></p> <ul style="list-style-type: none"> <li>• Actively engage in local community partnerships, volunteering, and sponsorship opportunities.</li> </ul> <p><b>Time Management</b></p> <ul style="list-style-type: none"> <li>• Maintain and action diary in line with proactive planning.</li> <li>• Complete reports on time.</li> <li>• Display leadership skills with a calm professional manner and role model to staff.</li> </ul> <p><b>Diary Management</b></p> <ul style="list-style-type: none"> <li>• Effectively manage electronic diary and review daily.</li> <li>• Forward plan a minimum of 2 weeks – include fortnightly 1:1 Catch ups, GROW Coaching sessions, Lender business partner meetings, business development activities, sales activities, and Branch Sales meetings.</li> </ul>

