

Position Description

Development and Quality Manager, Advisor Partners



The Cooperative Bank

Our purpose

Our long-term aspirations are to develop more long-term value-based relationships with our customers, and for our people to grow and develop so that they are better off working at the Co-operative.

Our values

Our values represent who we are, how we think, and how we behave to bring these to life every day. You'll demonstrate behaviours that define our core values and support an inclusive culture with a strong teamwork spirit.



About the team

Our Development and Quality team plays a critical role in ensuring that our broker channel operates efficiently and effectively, contributing directly to The Co-operative Bank's growth and customer success. This team partners closely with brokers to foster long-term relationships and ensure high standards in home loan applications. By collaborating across the business, the team drives process improvements that deliver better customer outcomes.

The Development and Quality team supports the Bank's goal of helping Kiwis achieve financial well-being by ensuring brokers are equipped with the right knowledge, tools, and support to deliver exceptional service. Our focus is on driving application quality, improving conversion rates, and ensuring brokers align with our values and purpose.

Purpose of this position

With accountability to drive growth and enhance performance within our broker channel, this role works alongside the Advisor Partner Manager and is responsible for fostering strong relationships with mortgage brokers, improving application quality, and ultimately increasing conversion rates for home loan applications.

This role plays a vital part in ensuring brokers understand The Co-operative Bank's values, products, and policies and that they have the tools and guidance needed to provide outstanding customer outcomes.

The Development and Quality Manager, Advisor Partners will work closely with internal teams to improve processes, develop education programs for brokers, and oversee quality control to enhance application accuracy and efficiency. By driving broker engagement, supporting process improvements, and ensuring compliance with regulatory standards, this role directly contributes to improving customer satisfaction and achieving the bank's strategic objectives.

Position reports to: Head of Specialist Banking

Challenges and opportunities of this role

- Balancing the need for strong broker engagement with ensuring compliance and quality control.
- Encouraging brokers to adopt consistent, high-quality application standards.
- Driving continuous improvement initiatives to enhance broker performance.
- Identifying and capitalising on opportunities for growth in new and existing broker relationships.
- Ensuring internal processes are optimised to support broker success and customer outcomes.
- Managing the balance between technology adoption and maintaining personal broker relationships.
- Navigating industry trends, regulatory changes, and shifting customer expectations to maintain a competitive edge.
- Developing strategies that align with the bank's values and vision to deliver exceptional customer outcomes.
- Finding innovative ways to support brokers in promoting the bank's unique purpose as a values-led financial institution.
- Creating educational content and resources that empower brokers to better serve aspirational, community-minded Kiwis.

How you will contribute:

| What you'll do | Success will mean |
|--|--|
| Relationship Management | |
| <p>Collaborate with the Marketing team to develop and execute a broker engagement strategy that builds strong relationships with high-performing brokers and networks, recognising the value of consistent, high-quality business.</p> <p>Establish and manage SLAs to maintain regular communication, gather feedback, and address broker concerns effectively.</p> | <ul style="list-style-type: none"> • Working with the Marketing team, collaborate on a broker strategy to build and maintain strong relationships with high-performing brokers and broker networks. • Develop a broker engagement strategy that recognises the value of high quality, consistent broker business – demonstrated through the depth and longevity of customer relationships. • Define and execute strong SLAs to build relationships with key brokers, including regular communication to gather feedback and address concerns. |

| What you'll do | Success will mean |
|---|---|
| Broker Development and Education | |
| <p>Develop and implement education programs to enhance brokers' understanding of the bank's values, products, and policies, ensuring alignment with our target audience of Aspirational Community Minded Kiwis.</p> <p>Conduct training sessions, collaborate with key internal leaders to target education opportunities, and identify geographic areas that present growth potential for brokers and customers.</p> | <ul style="list-style-type: none"> • Design and implement education programs for brokers to enhance their understanding of the bank – our purpose, our products, policies, and preferred application types. • Use insights into our target audience of Aspirational Community Minded Kiwis to help brokers target customers that are most likely to align with the bank's values and purpose. • Conduct regular workshops and training sessions to keep brokers updated on industry trends, regulatory changes, and our bank's evolving offerings. • Work with the Manager, Specialist Banking Solutions, to target education opportunities towards broker aggregators. • Work with the Head of Credit to identify and prioritise specific geographic areas that offer an opportunity to the bank, our broker partners and customers in those areas. |
| Quality Control and Process Improvement | |
| <p>Develop and manage quality control processes to ensure broker applications meet regulatory and bank standards, using data-driven insights to enhance application quality.</p> <p>Collaborate with internal teams to streamline processes, improve efficiency, and maintain compliance.</p> | <ul style="list-style-type: none"> • Develop and oversee quality management processes for the broker channel, ensuring all applications meet compliance and regulatory requirements, as well as the requirements of the bank. • Implement data-driven quality assurance processes to continuously monitor and improve application quality. • Collaborate with internal teams to streamline the application process and enhance efficiency. |
| Performance Analysis and Reporting | |
| <p>Analyse conversion rates and application quality metrics to pinpoint improvement areas, collaborating with priority brokers to implement initiatives.</p> <p>Prepare and present regular reports on broker channel performance and growth initiatives to broker partners and senior management.</p> | <ul style="list-style-type: none"> • Analyse conversion rates and application quality metrics to identify areas for improvement. Work with priority brokers to implement initiatives to deliver improvement. • Prepare and present regular reports to broker partners and senior management on broker channel performance and growth initiatives. |

| What you'll do | Success will mean |
|--|--|
| People Management | |
| <p>Effective leadership and people management.</p> <p>Establish and role model an achievement culture in your location and the wider Customer Banking team.</p> <p>Role model and embed the Banks beliefs.</p> | <ul style="list-style-type: none"> • Regular engagement and plans are in place with the team for the delivery of agreed Customer Banking OKR's (objective key results). • A regular cycle of team face to face catch ups is in place and documented as needed. • Development and training plans are in place for employees. • Manage and coach staff members where performance issues arise. • High level of employee satisfaction and engagement. • Recruitment (and retention) of first-rate people. • Effective succession planning. |
| Healthy and safe work environments | |
| <p>Follow all health and safety policies, standards, emergency procedures and plans.</p> <p>Participate in health and safety activities, training and meetings as required.</p> <p>Reports hazards, near misses, injuries, incidents, and ideas for continuous improvement.</p> <p>Cease work if an unsafe situation arises and seek assistance.</p> | <ul style="list-style-type: none"> • Having healthy and safe ways of working. • All workers feel empowered and aware of opportunities to participate in health and safety activities. • Our people can easily report hazards, near misses, injuries, incidents, and ideas for continuous improvement. • Workers stop work if they feel unsafe and connect with their people leader or other workers for assistance. |

Decision making and responsibilities

a) Decisions and/or financial accountabilities:

- Lending – delegation levels based on competence.
- Managing day-to-day broker engagement activities and relationship strategies.
- Implementing quality control processes and improvement initiatives.
- Employee disciplinary measures/actions, not including dismissal.
- Approving expenditure within budget limits for broker development and engagement initiatives.

Personnel Dimensions (Employees reporting to this position directly and indirectly):

- Number of staff: nil

b) Actions and decisions that are recommended to a higher level of management for approval:

- Recommend appointment of hiring employees.
- Strategic changes to broker engagement and education strategies.
- Significant process changes impacting application quality or regulatory compliance.
- Budget decisions exceeding delegated limits.

Qualifications and experience

- Bachelor's degree in business, Finance, or a related field; relevant industry certifications are advantageous.
- Role requires 3-5 years' experience in mortgage broking, banking, or financial services, with a focus on quality management and relationship building.

Skills and attributes

Technical Skills

- Strong understanding of New Zealand's mortgage market and regulatory environment.
- Analytical mindset with proficiency in data analysis and reporting tools.
- Results-driven, with a proactive approach to improving broker outcomes.

Personality Attributes

- Excellent communication and interpersonal skills, with the ability to engage effectively with brokers and internal stakeholders.
- Leadership experience, with the ability to drive change and motivate teams.
- Strong problem-solving skills with a focus on innovative solutions.
- Ability to manage multiple priorities and maintain focus on key objectives.

Leadership Skills

You will be expected to demonstrate behaviours from our Leadership skills framework through your actions, the way you work and how you work with others.