



Resales Settlement Lead

Position Outline



The Lifestyle Story...



2003

James Kelly, Dael Perlov and Bruce Carter developed a business plan

2004

Development of our first community at Brookfield –
Opened in June 2005

2007

Listed on the Australian Stock Exchange

2012

Major capital raising of \$36m

Since beginning Lifestyle Communities in 2003, our mission has always been to enable working, semi-retired and retired people over 50 to enjoy affordable luxury living in a secure community setting, while having the freedom to enjoy new possibilities with greater peace of mind.

Our first community was at Brookfield in Melton, and over the years we have kept improving on what we do based on the feedback from our customers and homeowners. We have grown the business on two key adages;

1. “You never get a second chance at a first impression” and we ensure that whether it is the look of our communities or the service we deliver, our customers always get a fantastic first impression.
2. “A customer may forget what you told them, but they will never forget how you made them feel”. We want to make every customer touchpoint an amazing experience, one that they will remember and recall with friends and family. We want to ensure that their experience living in a Lifestyle Community is an extremely positive one.

These two adages have been the key enabler of our growth and success over the years, and will become even more important as we develop and grow.



Our Purpose



We're champions for facilitating a bigger, more enhanced life for our homeowners. A cohort of like-minded retired, semi-retired and working downsizers who belong to a generation that's seen more change than any before; and possibly any to come.

We **build** communities because our homeowners have worked hard for what they have and they deserve affordable, beautifully-designed and low maintenance homes in concert with best-in-class amenities. We **create** communities because our homeowners haven't given up on returning to a time when they built strong communities around their own homes. We **nurture** the homeowners within our communities because they seek a space that's truly their own, that strikes the perfect balance between connection and privacy; independence and activity.

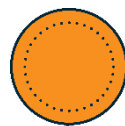
Like us, our homeowners rail against an earnestly bland existence or disappearing into a sea of sameness; the one-size-fits all approach that places limitations on what's possible. Which is why we actively listen to them; to their hopes for now and their dreams for the future, so the next time they ask, "what's next?" we've already been busy reimagining.

But, most of all, we champion bigger, more enhanced lives for our homeowners because we know that reducing their property footprint takes a giant leap of faith. This is why we believe it's a privilege to walk alongside them as they elevate the next phase of their lives.

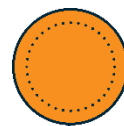
Like us, we believe they're just getting started.
After all, they're the generation of change. **And they're not done yet.**



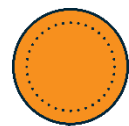
2014
1,000th homeowner
moved in



2016
2,000th homeowner
moved in &
10th Community
Clubhouse opened



2018
Acquired 17th
Community Site &
3,000th homeowner
moved in



2023
Land purchased for
our 31st Community
5,198 homeowners
1340 pets
An ASX top 200
business

Role Summary

In this role, you will support the Resales Sales function by taking responsibility for managing the General Admin & CRM usage of all business areas that impact customer settlements. You will assist department productivity and support cross-functionally to ensure that all appropriate data is entered into our CRM database and that it is set up to ensure success across each established community.

You will understand the customer journey from pre enquiry right through to settlement. You are also the expert on our internal processes and how we nurture our homeowners through the purchase process inclusive of agreements, pre-settlements and final settlements.

You are wizz at pulling together clear and engaging presentations and have a strong skillset across all Microsoft platforms, plus a strong understanding of CRM reporting

You will support the Head of Re-Sales and broader sales team, going where the action is, problem solving, training, and providing a real boost of energy wherever you go.



Who Am I?

I am a **passionate** person that really enjoys working in a highly engaged and supportive environment to deliver **amazing** service to our team and customers. I have an absolute **passion** about customer service and believe that delivering amazing customer service should be in every business' ethos.

I have **high empathy** and can put myself in the shoes of team members and our homeowners to understand their needs and how to provide an experience that exceeds their expectations.

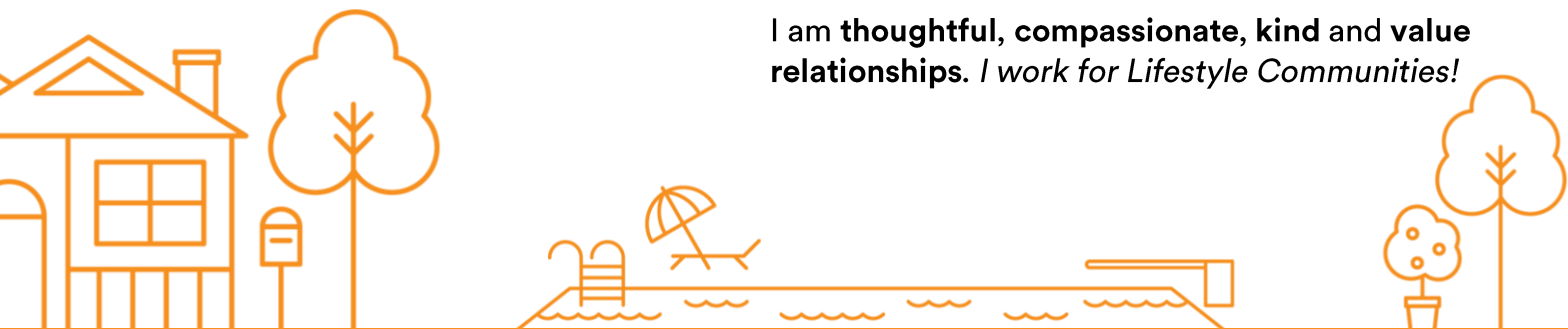
I have **high EQ** and my working style is one of **collaboration** and **consultation**. I see this role as both **challenging** and **rewarding**.


I am eager to grow my skill set whilst at the same time using my experience to achieve and drive results and **make a real difference**.

I continually seek to improve the overall experience for our team members and homeowners. I am excited to **think outside of the box** and constructively challenge the business to be exceptional in all that we do.

I treat everyone with **respect** and show humility in all interactions. I believe that Lifestyle Communities makes a real difference to our customers lives and I work to ensure that I can also make a difference to what we do and the service and product we deliver.

I am **thoughtful, compassionate, kind** and **value relationships**. *I work for Lifestyle Communities!*





Our customer
is our **only truth**

Do it from
the heart

Own it,
sort it

Play as
a team

Deliver.
Delight.
Everyday

Be constantly
curious

Our Values

Our values drive all our interactions with our customer.

We know that by living these values we can deliver excellent customer service to all stakeholders and believe that these values differentiate us from other operators in this sector.

POSITION TITLE	Resales Support & Settlement Lead
REPORTS TO	Head of Resales
DIRECT REPORTS	NA
LOCATION	Support Office Level 5, 101 Moray Street, South Melbourne VIC 3205 Travel to Lifestyle Communities throughout Victoria, as required.
EMPLOYMENT TYPE	Full Time
DEPARTMENT	Established Sales
KEY RELATIONSHIPS	
INTERNAL	<ul style="list-style-type: none"> ☑ Head of Resales ☑ Established Sales Team ☑ Contact Centre ☑ Marketing Team ☑ Design & Construction Team ☑ Homeowner Experience Team ☑ Finance Team ☑ Managing Director
EXTERNAL	<ul style="list-style-type: none"> ☑ Our Homeowners ☑ Potential Homeowners ☑ Software and digital agencies ☑ Real Estate representatives ☑ Potential new service providers

Resales Support & Settlement Lead

KEY TASKS / DELIVERABLES

WHAT WILL SUCCESS WILL LOOK LIKE?

Database Management

- ✔ Set up and maintain documentation issued to customers through CRM throughout the sales cycle, and work with marketing to update content as required.
- ✔ Monitor stakeholder usage of CRM and work with stakeholders to improve input and reporting accuracy when required.
- ✔ Develop an understanding and document the functional requirements of the CRM (Salesforce), and its integration points with business systems.
- ✔ Continual process improvement in line with desired customer and business outcomes

- ✔ All documentation sent from Salesforce are accurate and up to date.
- ✔ All data entered to Salesforce is accurate and complete.
- ✔ Functional requirements including integration points are documented and up to date
- ✔ Streamlining of current practices

Settlement Management

- ✔ Monitor and report on the settlement pipeline.
- ✔ Execute pipeline management with established teams.
- ✔ Provide consistent settlement support to our sales team across established communities to ensure our settlement experience at the company standard.
- ✔ Utilise CRM reports assist tracking settlement timelines

- ✔ Achievement of annual settlement Goal
- ✔ Highly engaged team with no customer bottlenecks
- ✔ Accurate reporting

Business Insights & Forecast reporting

- ✔ Monitor and report on resales stock levels to identify and track against company goals.
- ✔ Provide accurate reporting across established sales along with settlement forecasts to give insights to CFO, Managing Director and Head of Resales when reporting to board and market.
- ✔ Utilise CRM reports assist forecasting and tracking.

- ✔ Stock expectations met per reporting cycle.
- ✔ Timely and accurate provision of critical information to support decision making.
- ✔ Accurate settlement forecasting ensuring market confidence

Customer Journey management

- ✔ Assist to enhance and manage customer life-cycle strategies across all customer segments.

- ✔ Core customer interactions are mapped using data and stakeholder input.

Resales Support & Settlement Lead

Training & Development

- ✓ Support system changes and upgrades throughout the business on a project-by-project basis.
- ✓ Work with the Established Marketing Team across communities to assist customer journeys linked to events and print media to support customer engagement.
- ✓ Assist the customer journey from an initial deposit right through to settlement across touchpoints with different business function interactions
- ✓ Help support the established sales team take customers on journey from deposit to settlement and attend and contribute to events

- ✓ Attend Sales Events and attend community visits with a view to training and supporting the Sales team with key outcomes

Stakeholder Management

- ✓ Support Head of Resales with timely turnaround times, provision of data and creation of great presentations
- ✓ Build strong relationships with stakeholders across all business areas including Sales, Marketing, Homeowner Experience, and manage workflows to effectively manage expectations and meet deadlines.
- ✓ Provide regular staff support on Salesforce and maintain up-to-date user guides and training manuals.
- ✓ Work closely with other stakeholders and teams within the business to identify relevant insights relating to business initiatives.
- ✓ Always behave as a brand ambassador in all interactions, both written and verbal
- ✓ Treat all team members with respect, kindness and in line with our company standards and value

- ✓ All teams working seamlessly with the customer journey at the heart of our actions.
- ✓ Engaging events that deepen our customers relationship with Lifestyle and support them to moving into Lifestyle

- ✓ High visibility and high team competency around sales and settlement management

- ✓ Staff see you as the source of truth for anything related to CRM.
- ✓ Staff using CRM are trained and receive regular support to build competency.
- ✓ All issues related to CRM and its associated systems are owned, and swiftly addressed



What will *success* feel like for you?

In addition to fulfilling the requirements listed in this position outline, you will be **inspired** and **challenged**, and your learning curve will be steep. You will genuinely believe in the purpose of the business, and you will wake up eager to start the working day where your contributions are valued and rewarded.

THE KEY CHALLENGES OF THIS ROLE:

- ✓ Continuously seek to improve business processes and CRM function: ‘be curious’, ‘be passionate’
- ✓ Own all things Admin & CRM from enhancing CRM strategies, to being hands-on with data entry, accurate reporting, and assisting with staff training: ‘own it, sort it’
- ✓ Breaking down silos and prioritising the customer journey
- ✓ Assist department productivity.
- ✓ Helping each teamwork towards our annual settlement and time on market goal
- ✓ Time Management – As the ‘go to’ for internal teams and the Managing Director
- ✓ Working autonomously

OUR

ASK

OF



YOU



We have a strong history up to today and we need passionate, motivated and entrepreneurial team members to challenge the status quo.

By joining the Lifestyle Communities team, you are committing to give it your all, live our values, take some risk and make a difference.

That is all we ask.

I _____ ,
understand the key deliverables and values of Lifestyle Communities, and will execute my role as **Resales Support and Settlement Lead** to reflect this position outline.

Signature

Date