

## DEFENCE HOUSING AUSTRALIA

### DUTY STATEMENT / SELECTION CRITERIA

<b>TITLE</b>	: Senior Relationship Manager
<b>CLASSIFICATION</b>	: DHA Level 6
<b>POSITION NO</b>	: TBA
<b>LOCATION</b>	: Parramatta HMC, Sydney
<b>RESPONSIBLE TO</b>	: National Sales Manager

### THE ROLE

The Senior Relationship Manager position is located in Defence Housing Australia's (DHA's) Sales and Portfolio Management Division. The Division is responsible for portfolio operations & investment property sales.

In this role you will actively promote DHA's property investment product to prospective investors via the telephone, email and in face-to-face meetings, seminar presenting with a view to sell property. In doing so, you will help to ensure Corporate Plan sales targets are achieved.

You will persuade and influence prospective investors through sound communication and interpersonal skills, a strong customer service focus and be a committed team player. You will have the ability to represent DHA in a professional capacity and develop effective business relationships. Your presenting style in a seminar forum will engage and convince the most discerning clients.

It is expected you will pursue professional development within the real estate industry. Your dedication to self development and business improvement will significantly contribute to the achievement of corporate objectives.

### OPERATING ENVIRONMENT

This is a full-time position. DHA's core business hours are between 8.30am and 5.00pm Monday to Friday. DHA operates under flexible working hours and staff may be required to work outside core business hours at times.

DHA operates throughout all Australian states and territories, and there may be a requirement for the successful applicant to travel to other DHA offices as directed by management.

## **DHA VALUES**

All DHA staff are required to display the following values. You do not need to address these characteristics specifically but should keep them in mind when responding to the selection criteria below.

- Respect
- Excellence
- Integrity
- Enthusiasm
- Innovation
- Team work

## **MAIN DUTIES**

1. Present the DHA investment seminar program across the country. Work in consultation with sales management on key deliverables such as content, registrations, attendance and return on investment.
2. Manage a database of clients and actively engage clients as required to explain DHA processes and decisions, resolve issues and sell properties; ensuring high levels of customer service at all times. Manage escalated issues as they arise as well as providing support and guidance to internal and external sales consultants.
3. Actively promote DHA's Sale and Leaseback product to an allocated database of prospective investors. Leverage off existing contacts, promoting DHA as an investment product of choice for SMSF's. In doing so you will aim to meet or exceed an individual sales target, contributing to the achievement of Corporate Plan sales targets.
4. Use DHA's web-based sales Customer Relationship Management (CRM) system to maintain the accuracy of client records, record interactions and develop targeted, influential communication.
5. Assist Sales Management and the broader sales team in its activities as required. This may include, but is not limited to, assisting with general lead qualification and performing data integrity against DHA's other systems.
6. Maintain a well-developed understanding of the Australian residential property market, including but not limited to, supply and demand drivers, and the factual presentation of price, rent and growth predictions.
7. Establish and maintain effective and productive working relationships with DHA staff, stakeholders, contractors and third party agencies.
8. At times provide guidance and support to a small team of Sales Consultants.
9. Other duties as directed by senior management.

**Specific goals against key result areas are outlined in each individual staff member's performance development agreement each year.**

## SELECTION CRITERIA

### **Essential:**

1. Proven sales management experience, with the ability to achieve individual and organisational sales targets through sound judgement, intelligence and common sense.
2. Extensive and well polished communication, consultation, negotiation and presentation skills. The ability to present a sales proposal via a one on one phone call or a forum of over 100.
3. Proven ability to work independently, and as a member of team, to cultivate and maintain productive internal and external working relationships with a commitment to team work.
4. Knowledge of the finance sector with a key focus on superannuation. Understand the full workings of SMSF's with the ability to persuade those High Net Worth clients.
5. Proven experience in using sales management technologies, including customer relationship management systems and related databases.

### **Highly Desirable:**

6. Knowledge and understanding of DHA's core business, particularly its Sale and Leaseback product, stakeholders and customers.

## DEFENCE HOUSING AUSTRALIA

### DUTY STATEMENT / SELECTION CRITERIA

<b>TITLE</b>	: Relationship Manager
<b>CLASSIFICATION</b>	: DHA Level 6
<b>POSITION NO</b>	: TBA
<b>LOCATION</b>	: Head Office, Canberra
<b>RESPONSIBLE TO</b>	: National Sales Manager

#### THE ROLE

The Relationship Manager position is located in Defence Housing Australia's (DHA's) Sales, Marketing and Portfolio Management Division. The Division is responsible for portfolio operations, investment property sales, product marketing, lessor relations, marketing communication and performance measurement.

In this role you will actively promote DHA's property investment product to prospective investors via the telephone, email and in face-to-face meetings, with a view to sell property. In doing so, you will help to ensure Corporate Plan sales targets are achieved.

You will persuade and influence prospective investors through sound communication and interpersonal skills, a strong customer service focus and be a committed team player. You will have the ability to represent DHA in a professional capacity and develop effective business relationships.

It is expected you will pursue professional development within the real estate industry. Your dedication to self development and business improvement will significantly contribute to the achievement of corporate objectives.

#### OPERATING ENVIRONMENT

This is a full-time position. DHA's core business hours are between 8.30am and 5.00pm Monday to Friday. DHA operates under flexible working hours and staff may be required to work outside core business hours at times.

DHA operates throughout all Australian states and territories, and there may be a requirement for the successful applicant to travel to other DHA offices as directed by management.



## **DHA VALUES**

All DHA staff are required to display the following values. You do not need to address these characteristics specifically but should keep them in mind when responding to the selection criteria below.

- Respect
- Excellence
- Integrity
- Enthusiasm
- Innovation
- Team work

## **MAIN DUTIES**

1. Actively promote DHA's Sale and Leaseback product to an allocated database of prospective investors via the telephone, email and in face-to-face meetings, with a view to sell property. In doing so you will aim to meet or exceed an individual sales target, contributing to the achievement of Corporate Plan sales targets.
2. Manage a database of clients and actively engage clients as required to explain DHA processes and decisions, resolve issues and sell properties; ensuring high levels of customer service at all times. Manage escalated issues as they arise as well as providing support and guidance to Sales Consultants.
3. Use DHA's web-based sales Customer Relationship Management (CRM) system to maintain the accuracy of client records, record interactions and develop targeted, influential communication.
4. Assist Sales Management and the broader sales team in its activities as required. This may include, but is not limited to, managing client databases on behalf of another consultant during periods of absence, assisting with general lead qualification and performing data integrity against DHA's other systems.
5. Maintain a well-developed understanding of the Australian residential property market, including but not limited to, supply and demand drivers, and the factual presentation of price, rent and growth predictions.
6. Establish and maintain effective and productive working relationships with DHA staff, stakeholders, contractors and third party agencies.
7. At times provide guidance and support to a small team of Sales Consultants.
8. Other duties as directed by senior management.

**Specific goals against key result areas are outlined in each individual staff member's performance development agreement each year.**

## **SELECTION CRITERIA**

### **Essential:**

1. Qualifications in real estate (i.e. Certificate of Real Estate or License) with proven ability to deliver outcomes while maintaining integrity and confidentiality.
2. Proven sales management experience, with the ability to support and guide a team to achieve individual and organisational sales targets through sound judgement, intelligence and common sense.
3. Well developed communication, consultation, negotiation and presentation skills, including a good phone manner and the ability to present a sales proposal via telephone or in person.
4. Proven ability to work independently, and as a member of team, to cultivate and maintain productive internal and external working relationships with a commitment to team work.
5. Proven experience in using sales management technologies, including customer relationship management systems and related databases.

### **Highly Desirable:**

6. Knowledge and understanding of DHA's core business, particularly its Sale and Leaseback product, stakeholders and customers.

## DEFENCE HOUSING AUSTRALIA

### DUTY STATEMENT / SELECTION CRITERIA

<b>TITLE</b>	: Senior Relationship Manager
<b>CLASSIFICATION</b>	: DHA Level 6
<b>POSITION NO</b>	: 3949
<b>LOCATION</b>	: Brisbane HMC, Sydney
<b>RESPONSIBLE TO</b>	: National Sales Manager

### THE ROLE

The Senior Relationship Manager position is located in Defence Housing Australia's (DHA's) Sales and Portfolio Management Division. The Division is responsible for portfolio operations & investment property sales.

In this role you will actively promote DHA's property investment product to prospective investors via the telephone, email and in face-to-face meetings, seminar presenting with a view to sell property. In doing so, you will help to ensure Corporate Plan sales targets are achieved.

You will persuade and influence prospective investors through sound communication and interpersonal skills, a strong customer service focus and be a committed team player. You will have the ability to represent DHA in a professional capacity and develop effective business relationships. Your presenting style in a seminar forum will engage and convince the most discerning clients.

It is expected you will pursue professional development within the real estate industry. Your dedication to self development and business improvement will significantly contribute to the achievement of corporate objectives.

### OPERATING ENVIRONMENT

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## **DHA VALUES**

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- Respect
- Excellence
- Integrity
- Enthusiasm
- Innovation
- Team work

## **MAIN DUTIES**

1. Present the DHA investment seminar program across the country. Work in consultation with sales management on key deliverables such as content, registrations, attendance and return on investment.
2. Manage a database of clients and actively engage clients as required to explain DHA processes and decisions, resolve issues and sell properties; ensuring high levels of customer service at all times. Manage escalated issues as they arise as well as providing support and guidance to internal and external sales consultants.
3. Actively promote DHA's Sale and Leaseback product to an allocated database of prospective investors. Leverage off existing contacts, promoting DHA as an investment product of choice for SMSF's. In doing so you will aim to meet or exceed an individual sales target, contributing to the achievement of Corporate Plan sales targets.
4. Use DHA's web-based sales Customer Relationship Management (CRM) system to maintain the accuracy of client records, record interactions and develop targeted, influential communication.
5. Assist Sales Management and the broader sales team in its activities as required. This may include, but is not limited to, assisting with general lead qualification and performing data integrity against DHA's other systems.
6. Maintain a well-developed understanding of the Australian residential property market, including but not limited to, supply and demand drivers, and the factual presentation of price, rent and growth predictions.
7. Establish and maintain effective and productive working relationships with DHA staff, stakeholders, contractors and third party agencies.
8. At times provide guidance and support to a small team of Sales Consultants.
9. Other duties as directed by senior management.

**Specific goals against key result areas are outlined in each individual staff member's performance development agreement each year.**

## SELECTION CRITERIA

### **Essential:**

1. Proven sales management experience, with the ability to achieve individual and organisational sales targets through sound judgement, intelligence and common sense.
2. Extensive and well polished communication, consultation, negotiation and presentation skills. The ability to present a sales proposal via a one on one phone call or a forum of over 100.
3. Proven ability to work independently, and as a member of team, to cultivate and maintain productive internal and external working relationships with a commitment to team work.
4. Understand the full workings of SMSF's with the ability to persuade those High Net Worth clients into making DHA the investment option of choice.
5. Proven experience in using sales management technologies, including customer relationship management systems and related databases.

### **Highly Desirable:**

6. Knowledge and understanding of DHA's core business, particularly its Sale and Leaseback product, stakeholders and customers.

**Rankin, Jenna**

**From:** Pothan, Lesley  
**Sent:** Monday, 16 June 2014 4:18 PM  
**To:** Lefevre, Beth  
**Subject:** FW: Approval Required

FYA

**From:** Howman, Peter  
**Sent:** Monday, 16 June 2014 4:06 PM  
**To:** Pothan, Lesley  
**Subject:** Re: Approval Required

Approved

Please visit

<http://www.ceosleepout.org.au/ceos/act-ceos/pg>

Regards,

Peter Howman  
 Managing Director | Defence Housing Australia

26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6217 8509 | Fax: 02 6217 8462  
[peter.howman@dha.gov.au](mailto:peter.howman@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)  
 Sent from my iPad

On 16 Jun 2014, at 2:56 pm, "Pothan, Lesley" <[lesley.pothan@dha.gov.au](mailto:lesley.pothan@dha.gov.au)> wrote:

Hi Peter

For your consideration and approval.

Name	Business Unit	Position Title	Classification	Type	Length of Contract/Extension	Requested By
	LIA Contact Centre	Contact Centre Operator	DHA Level 4			Denica Saunders

**Additional Info:**

⇒

⇒ Please find attached the REM form, Duty Statement and Business Case with further background information.

⇒ COO approval via email is also attached.

**Business Case:**

- ⇒ A review of the position level has been conducted and it is within FTE/budget.
- ⇒ This is an existing position that commenced on 1 September 2013 when the LIA Contact Centre went live
- ⇒ This role is critical to the day to day operations of the LIA Contact Centre and meeting our contracted agreement with Defence to manage LIA contributions to our KPIs. It is intended this position will be advertised as part of the LIA Contact Centre recruitment strategy, however there are concerns that this strategy will not be finalised by contract cease date. To allow for this, the recommendation is to
- ⇒ There are currently no suitable alternatives as The relevant skills are not easily acquired and to train another staff member at this time would impact on the ability to manage LIA contributions.

Name	Business Unit	Position Title	Classification	Type	Length of Contract/Extension	Requested By
	Sales & Marketing	Senior Relationship Manager	DHA Level 6			Jason Netting

**Additional Info:**

- ⇒ Approval is requested for the of Senior Relationship Manager, in Sales & Marketing. t to the position

S4F

- ⇒ Please find attached the REM form, Duty Statement and Business Case with further background information. Please note that although the total package listed on the REM form will remain the same, the break-down will be different as an IFA will be incorporated to keep the base salary with the range of the a DHA Level 6.
- ⇒ COO approval via email is also attached.

**Business Case:**

- ⇒ A review of the position level has been conducted. The current position is DHA Level 6 and it will remain at this level.
- ⇒ This is an existing position. the recommendation is to engage of Relationship Manager. s47F
- ⇒ The internal sales team would be greatly boosted by the skills and expertise of If this position was not filled, the targets for the 2014/2015 FY would struggle to be met for the sale and leaseback program.
- ⇒ Engaging would be the most suitable outcome to fill this position. s47F

Kind Regards

Lesley

**Lesley Pothan**  
General Manager  
Corporate Affairs  
Defence Housing Australia

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Tel: 02 6217 8459|Fax 02 6217 8432  
Mobile:  
E-mail: [lesley.pothan@dha.gov.au](mailto:lesley.pothan@dha.gov.au)

s47F



**Rankin, Jenna**

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**From:** Guthrie, Scott  
**Sent:** Monday, 26 May 2014 9:39 AM  
**To:** Brandon, Jenna  
**Subject:** FW: Approval Required

Kind Regards,

**Scott Guthrie** | Acting Manager, HR Services and Payroll  
 Corporate Affairs | Defence Housing Australia  
 Level 5, 470 Northbourne Avenue Dickson ACT 2602  
 Tel: 02 6217 8544 | [scott.guthrie@dha.gov.au](mailto:scott.guthrie@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)  
 Please consider the environment before printing this email

**From:** Pothan, Lesley  
**Sent:** Friday, 23 May 2014 9:38 PM  
**To:** Guthrie, Scott; Rankin, Jenna  
**Subject:** Fwd: Approval Required

FYA

Sent from my iPhone

Begin forwarded message:

**From:** "Howman, Peter" <[Peter.Howman@dha.gov.au](mailto:Peter.Howman@dha.gov.au)>  
**Date:** 23 May 2014 6:09:36 pm AEST  
**To:** "Pothan, Lesley" <[lesley.pothan@dha.gov.au](mailto:lesley.pothan@dha.gov.au)>  
**Subject:** Re: Approval Required

Approved

Regards,  
 Peter Howman  
 [Sent from my mobile phone]

On 23 May 2014, at 1:11 pm, "Pothan, Lesley" <[lesley.pothan@dha.gov.au](mailto:lesley.pothan@dha.gov.au)> wrote:

Hi Peter

For your consideration and approval

Name	Business Unit	Position Title	Classification Type	Length of Contract/Extension	Requested By
s47F	Melbourne HMC	Property Manager	DHA Level 3		George Artemiou

**Additional Info:**

s47F

Approval is requested for the  
of Property Manager to commence

in the position

s47F

This role will manage a portfolio of service residences within the Melbourne area including the tenancy, maintenance and presentation of properties to Defence members and their families. Please find attached the REM form, business case with further background information.

**Business Case:**

A review of this position has occurred within the confirmed staffing establishment. The property manager role is critical to the HMC and requires urgent filling. If this role is not filled, the impact to the business would be enormous as we would not have enough staff to meet the demands of providing housing to our stakeholders. No other alternative could provide a suitable outcome.

Name	Business Unit	Position Title	Classification Type	Length of Contract/Extension	Requested By
s47F	Sales & Marketing	Senior Relationship Manager	DHA Level 6	11	Emma Law

**Additional Info:**

s47F

Approval is requested for the  
the position of Senior Relationship Manager in Sales & Marketing

s47F

Please find attached the REM form, Duty Statement and Business Case with further background information. Please note that although the total package listed on the REM form will remain the same, the break-down will be different as an IFA will be incorporated to keep the base salary with the range of the a DHA Level 6. COO approval via email is also attached.

**Business Case:**

A review of the position level has been conducted. The cost would be allocated against selling expenses but would be counted as an FTE in the budget. The overall cost would be less than other sales agents as an employee would be entitled to a bonus and not commission. This is a new role to replace an external sales agent. The Senior Relationship Manager is critical to the successful and premium delivery of the seminar program, increasing the SMSF exposure and sales and ensuring the SLB BAII target and MCA targets are met.

s47F

Business Unit	Position Title	Classification	Type	Length of Contract if Non-ongoing	Requested By
Corporate Shared Services	Consultant and Complex Task Consultant	DHA3 & DHA4	Non-ongoing	12 months	Howard Faulks

**Additional Info:**

Request for approval for the recruitment services of the identified positions on a non-ongoing basis via DHA's Panel of Preferred Providers:

3 x CSS Consultants DHA3  
2 x CSS Complex Task Consultants DHA4

Please find attached business case and duty statement with further background information.

**Business Case:**

A review of the level for this has been conducted – these are new positions as part of the establishment of the Corporate Shared Services (CSS) Group which was endorsed at an Executive Meeting on 18 February 2014.

The Consultant role within CSS will be required to process Tier 1 level transactions and the Complex Task Consultant role is the initial escalation point after Tier 1.

The requirement for this number of Consultants and Complex Task Consultants was identified during the Shared Services project and is seen as a requirement to the successful establishment and operation of CSS.

Following the transfer of staff from existing functions, the internal EOI process and a review of the Redeployment Register it has been identified that an additional number of vacancies exist for Consultants and Complex Task Consultants.

The filling of these positions are important to the success of CSS.

Thank you  
Lesley

**Lesley Pothan**  
General Manager  
Corporate Affairs  
Defence Housing Australia

Tel: 02 6217 8459/Fax 02 6217 8432  
Mobile:  
E-mail: [lesley.pothan@dha.gov.au](mailto:lesley.pothan@dha.gov.au)

s47F

## Netting, Jason

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**From:** Sydrych, Kristie  
**Sent:** Monday, 16 June 2014 10:24 AM  
**To:** HR; Rankin, Jenna  
**Cc:** Netting, Jason  
**Subject:** FW: Relationship Manager - s47F

Good morning

Please find COO approval and paperwork attached for : s47F



Kind regards  
Kristie

**Kristie Sydrych** | Executive Assistant  
 Defence Housing Australia

26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6002  
[kristie.sydrych@dha.gov.au](mailto:kristie.sydrych@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

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**From:** Netting, Jason  
**Sent:** Friday, 13 June 2014 9:37 AM  
**To:** Sydrych, Kristie  
**Cc:** Bechelli, Elvio; Carton, Daniel  
**Subject:** Relationship Manager - : s47F

Hi Kristie,

Please find attached the relevant documentation for Madeline's approval. Elvio has approved based on the below information.

Let me know if you require anything further. s47F

Kind Regards,

**Jason Netting** | National Sales Manager  
 Sales & Portfolio Management | Defence Housing Australia  
 26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mobile: ( )  
[jason.netting@dha.gov.au](mailto:jason.netting@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au) s47F



Business Case Recruitment 3942 Senior Relationship Manager

s47F

**From:** Bechelli, Elvio  
**Sent:** Thursday, 12 June 2014 4:58 PM  
**To:** Netting, Jason  
**Subject:** RE: Relationship Manager -

Jason,

Approved subject to the following:

Is there a salary difference between what was paid and what will be paid. If there is, it would be helpful to highlight s47F

Rgds  
 Elvio

**From:** Netting, Jason  
**Sent:** Thursday, 12 June 2014 4:50 PM  
**To:** Bechelli, Elvio  
**Subject:** Relationship Manager - : s47F

Hi Elvio,

Further to our conversation this morning on the replacement of s47F

I am seeking your formal email approval prior to sending on to Madeline.

Kind Regards,

**Jason Netting** | National Sales Manager  
 Sales & Portfolio Management | Defence Housing Australia  
 26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mobile:  
[jason.netting@dha.gov.au](mailto:jason.netting@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F



## **Business Case**

### **Remuneration (REM) Form Attachment**

#### **Purpose**

This document is an attachment to the Remuneration (REM) Form to support the recommended recruitment process or extension request as a result of the interim recruitment arrangements.

#### **Key Issues / Justification**

- Confirm that a review of the level of the position has occurred.
  - The current position is a Level 6 and will remain at this level.
- Outline why the position is critical. For example, what would the impact be to the business if the position is not filled?
  - The internal sales team would be greatly boosted by the skills and expertise of s47F Targets for the 2014/2015 FY would struggle to be met for the sale & leaseback program.
- Is the position new or existing? If existing, how long has the position been vacant?
  - Existing
- If extending a non-ongoing contract, why is the non-ongoing staff member required in the position (and not advertising to potentially displaced staff).
  - N/A
- Are there any alternatives that could provide a suitable outcome?
  - N/A

#### **Consultation**

In consultation with Daniel Carton (Head of Sales & Portfolio Management).

## Recruitment Activity Request Form

As per Madeline Dermatossian's, Chief Operating Officers (COO) request, effective 11 September 2013 requests to engage staff in either of the below listed following categories are to be submitted to the COO for review and approval:

- contract (temp staff who are engaged through a recruitment agency)
- non-ongoing or,
- ongoing staff.

Please complete the below and submit to the COO prior to forwarding to HR Services.

**Please ensure to attach the most recent Duty Statement, contact HR Services should you require the most recent version.**

Date requested submitted	12/06/2014
Requested by	Jason Netting
Recruitment type	Non-ongoing
Position Title	Senior Relationship Manager
Classification Level	DHA Level 6
Classification Salary Range	DHA Level 6 \$76,247 - \$87,668
Proposed Base Salary (include IFA remuneration if applicable)	1 s47F
Is this within your salary/FTE budget (If no utilise the space below to present a business case to support your request).	Yes

## DEFENCE HOUSING AUSTRALIA

### DUTY STATEMENT / SELECTION CRITERIA

<b>TITLE</b>	: Senior Relationship Manager
<b>CLASSIFICATION</b>	: DHA Level 6
<b>POSITION NO</b>	: 3949
<b>LOCATION</b>	: Brisbane HMC, Sydney
<b>RESPONSIBLE TO</b>	: National Sales Manager

#### THE ROLE

The Senior Relationship Manager position is located in Defence Housing Australia's (DHA's) Sales and Portfolio Management Division. The Division is responsible for portfolio operations & investment property sales.

In this role you will actively promote DHA's property investment product to prospective investors via the telephone, email and in face-to-face meetings, seminar presenting with a view to sell property. In doing so, you will help to ensure Corporate Plan sales targets are achieved.

You will persuade and influence prospective investors through sound communication and interpersonal skills, a strong customer service focus and be a committed team player. You will have the ability to represent DHA in a professional capacity and develop effective business relationships. Your presenting style in a seminar forum will engage and convince the most discerning clients.

It is expected you will pursue professional development within the real estate industry. Your dedication to self development and business improvement will significantly contribute to the achievement of corporate objectives.

#### OPERATING ENVIRONMENT

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## **DHA VALUES**

All DHA staff are required to display the following values. You do not need to address these characteristics specifically but should keep them in mind when responding to the selection criteria below.

- Respect
- Excellence
- Integrity
- Enthusiasm
- Innovation
- Team work

## **MAIN DUTIES**

1. Present the DHA Investment seminar program across the country. Work in consultation with sales management on key deliverables such as content, registrations, attendance and return on investment.
2. Manage a database of clients and actively engage clients as required to explain DHA processes and decisions, resolve issues and sell properties; ensuring high levels of customer service at all times. Manage escalated issues as they arise as well as providing support and guidance to internal and external sales consultants.
3. Actively promote DHA's Sale and Leaseback product to an allocated database of prospective investors. Leverage off existing contacts, promoting DHA as an investment product of choice for SMSF's. In doing so you will aim to meet or exceed an individual sales target, contributing to the achievement of Corporate Plan sales targets.
4. Use DHA's web-based sales Customer Relationship Management (CRM) system to maintain the accuracy of client records, record interactions and develop targeted, influential communication.
5. Assist Sales Management and the broader sales team in its activities as required. This may include, but is not limited to, assisting with general lead qualification and performing data integrity against DHA's other systems.
6. Maintain a well-developed understanding of the Australian residential property market, including but not limited to, supply and demand drivers, and the factual presentation of price, rent and growth predictions.
7. Establish and maintain effective and productive working relationships with DHA staff, stakeholders, contractors and third party agencies.
8. At times provide guidance and support to a small team of Sales Consultants.
9. Other duties as directed by senior management.

**Specific goals against key result areas are outlined in each individual staff member's performance development agreement each year.**

## SELECTION CRITERIA

### **Essential:**

1. Proven sales management experience, with the ability to achieve individual and organisational sales targets through sound judgement, intelligence and common sense.
2. Extensive and well polished communication, consultation, negotiation and presentation skills. The ability to present a sales proposal via a one on one phone call or a forum of over 100.
3. Proven ability to work independently, and as a member of team, to cultivate and maintain productive internal and external working relationships with a commitment to team work.
4. Understand the full workings of SMSF's with the ability to persuade those High Net Worth clients into making DHA the investment option of choice.
5. Proven experience in using sales management technologies, including customer relationship management systems and related databases.

### **Highly Desirable:**

6. Knowledge and understanding of DHA's core business, particularly its Sale and Leaseback product, stakeholders and customers.

s47F

Section 5 - Background Information			
Provide title and classification of this employee and how they relate to their employment. If salary is above \$25,000, include employee's annual earnings and must be provided for all employees. Salary copies will be provided for all employees (if applicable).			
Section 6 - Approval			
Manager's name and title	Manager's signature and date		
Jason Netting - National Sales Manager			12/06/2014
Delegate's name and title	Delegate's signature and date		
Emo Bechell - GM Portfolio Management & Marketing			12/06/2014
Human Resources approval and date	HR date of approval and date (if applicable)		1/1
Section 7 - For completion by Human Resources Policy and Programs only			
Please check appropriate options:			
Non-ongoing Engagement Letter	<input type="checkbox"/>	Transfer (Internal/external)	<input type="checkbox"/>
Ongoing Engagement Letter	<input type="checkbox"/>	Promotion (Internal/external)	<input type="checkbox"/>
Extension of Contract Letter	<input type="checkbox"/>	Advancement	<input type="checkbox"/>
Salary Increase	<input type="checkbox"/>		
Please answer (if applicable)			
Contract type	<input type="checkbox"/> New	<input type="checkbox"/> Continuing	<input type="checkbox"/> Complete
Is this employee's position open?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Selection process used	<input type="checkbox"/> Yes <input type="checkbox"/> No	Final date	
HR review			
Comments			

## Netting, Jason

---

**From:** Carton, Daniel  
**Sent:** Tuesday, 8 July 2014 10:15 AM  
**To:** Netting, Jason  
**Subject:** FW: ; s47F

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6039 | Fax: 02 6222 2269 | Mob: ; s47F  
[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

**From:** Bechelli, Elvio  
**Sent:** Friday, 2 May 2014 7:48 AM  
**To:** Carton, Daniel  
**Subject:** Fwd: ; s47F

Dan

This approved subject to confirming that this is the only external we are replacing. Also ensure Jon is ok with this.

Pls confirm

rgds  
 Elvio

Sent from my iPad

Begin forwarded message:

**From:** "Dermatossian, Madeline" <[madeline.dermatossian@dha.gov.au](mailto:madeline.dermatossian@dha.gov.au)>  
**Date:** 1 May 2014 9:14:34 pm AEST  
**To:** "Bechelli, Elvio" <[elvio.bechelli@dha.gov.au](mailto:elvio.bechelli@dha.gov.au)>  
**Subject:** Re: ; s47F

approved. is this the only one that we are replacing?

Regards  
 Madeline

Madeline Dermatossian  
 Chief Operating Officer | Defence Housing Australia  
 26 Brisbane Avenue Barton ACT 2600  
 Tel: [02 6217 8509](tel:0262178509) | [www.dha.gov.au](http://www.dha.gov.au)

On 1 May 2014, at 4:24 pm, "Bechelli, Elvio" <[elvio.bechelli@dha.gov.au](mailto:elvio.bechelli@dha.gov.au)> wrote:

Madeline,

This is a candidate to replace one of our external sales agent.

s47F

costs would be allocated against selling expenses but would be counted as an FTE in the budget.

Rgds  
Elvio

-----Original Message-----

From: Carton, Daniel  
Sent: Wednesday, 30 April 2014 4:47 PM  
To: Bechelli, Elvio  
Cc: Netting, Jason  
Subject: FW: [REDACTED] s47F

Elvio,

As discussed today, one of our prospects for an external consultant is (see details on [REDACTED] below). We thought he would also fill the role of a new ace presenter particularly as we get these SMSF seminars off the ground. As you can see below, that would make him a great addition to the sales team.

s47F

Jason and I would support his employment  
He would be employed as an APS 6

s47F

The selling expense budget can accommodate this hire though it would represent an additional FTE. I believe we could secure support from Jon B based on the savings we will achieve w the new 14/15 external consultant contracts plus the fact that we will have reduced at least one external consultant.

Please advise whether we can proceed with hiring [REDACTED] on this basis.

Regards  
Dan

s47F

Dan Carton | Head of Sales & Portfolio Management Defence Housing  
Australia  
26 Brisbane Avenue Barton ACT 2600  
Tel: 02 6270 6039 | Fax: 02 6222 2269 | Mob: [REDACTED] s47F

[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

-----Original Message-----

From: Netting, Jason

Sent: Wednesday, 30 April 2014 4:02 PM

To: Carton, Daniel

Subject: s47F

Hi Dan,

Some background on s47F

s47F

Kind Regards,

Jason Netting  
National Sales Manager  
Defence Housing Australia  
02 6270 6072

s47F

**Brandon, Jenna**

**From:** Dermatossian, Madeline  
**Sent:** Monday, 16 June 2014 10:03 AM  
**To:** Sydrych, Kristie; Bechelli, Elvica  
**Subject:** RE: For approval: Relationship Manager

s47F

Approved

Regards  
Madeline

**Madeline Dermatossian** | Chief Operating Officer  
Defence Housing Australia  
26 Brisbane Avenue Barton ACT 2600  
Tel: 02 8836 5759 | Fax: 02 6222 2268 | Mob:  
[madeline.dermatossian@dha.gov.au](mailto:madeline.dermatossian@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

**From:** Sydrych, Kristie  
**Sent:** Monday, 16 June 2014 9:23 AM  
**To:** Dermatossian, Madeline  
**Subject:** FW: For approval: Relationship Manager

s47F

Madeline

Just following up as this one has not been approved yet. Are you looking into this one further?

Thanks  
Kristie

**From:** Sydrych, Kristie  
**Sent:** Friday, 13 June 2014 9:45 AM  
**To:** Dermatossian, Madeline  
**Subject:** For approval: Relationship Manager -

s47F



Hi Madeline

s47F

Paperwork for your approval for

Elvio's approval is below.

Thanks  
Kristie

**Kristie Sydrych** | Executive Assistant  
Defence Housing Australia

26 Brisbane Avenue Barton ACT 2600  
Tel: 02 6270 6002  
[kristie.sydrych@dha.gov.au](mailto:kristie.sydrych@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

**From:** Netting, Jason

**Sent:** Friday, 13 June 2014 9:37 AM

**To:** Sydrych, Kristie

**Cc:** Bechelli, Elvio; Carton, Daniel

**Subject: Relationship Manager -**

s47F

<< File: Business Case Attachment - 3949 .  
Senior Relationship Manager DHA6.docx >>

..docx>><<File: Recruitment Activity Request Form - 12 month Contract -  
muneration Form . ( 01-07-2014 to 30-06-2014 - Signed.pdf>>

s47F

File: 3949 -

Please find attached the relevant documentation for Madeline's approval. Elvio has approved based on the below information.

Let me know if you require anything further.

s47F

Kind Regards,

**Jason Netting | National Sales Manager**

s47F

Sales & Portfolio Management | Defence Housing Australia  
26 Brisbane Avenue Barton ACT 2600  
Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mobile: (02) 6222 2269  
[jason.netting@dha.gov.au](mailto:jason.netting@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

---

**From:** Bechelli, Elvio  
**Sent:** Thursday, 12 June 2014 4:58 PM  
**To:** Netting, Jason  
**Subject:** RE: Relationship Manager - [REDACTED]

Jason,

Approved subject to the following: s47F

Is there a salary difference between what [REDACTED] was paid and what [REDACTED] will be paid. If there is, it would be helpful to

Rgds  
Elvio s47F

---

**From:** Netting, Jason  
**Sent:** Thursday, 12 June 2014 4:50 PM  
**To:** Bechelli, Elvio  
**Subject:** Relationship Manager s47F

Hi Elvio,

Further to our conversation this morning on the replacement of

I am seeking your formal email approval prior to sending on to Madeline.

Kind Regards,

**Jason Netting** | National Sales Manager  
Sales & Portfolio Management | Defence Housing Australia  
26 Brisbane Avenue Barton ACT 2600  
Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mobile: (02) 6222 2269



## Advertising Checklist

<input checked="" type="checkbox"/> Created In JIRA	JIRA Case Number	HRSD - 1790
---	------------------	-------------

### Position Information

Position title	Relationship Manager		
Position number	TBA		
Position classification	DHAB		
Employment type	Ongoing	Non-ongoing	Contract duration
Name of Contact Officer	Jason Netting		
Contact Officer phone	(02) 6270 6072		
Contact Officer email	jason.netting@dha.gov.au		
Date received by HR			

### Items Received

Request to Advertise	<input checked="" type="checkbox"/>	Duty Statement	<input checked="" type="checkbox"/>
Delegate Approval	<input checked="" type="checkbox"/>	New or EL1/2? - LP approval	<input checked="" type="checkbox"/>

### Internal Advertising

Source of advertising	Intranet		
Length of advertising	1 week	2 weeks	Other:
Date advertised	12-09-13		
Closing date	19-09-13		

### External Advertising

Advertising sourcing	Seek Website	Newspapers / Adcorp	Gazette
	DHA Intranet	DHA Website	
Length of advertising	2 week	3 weeks	Other:
Date advertised			
Closing date			
<b>NGA</b>			
Date uploaded onto NGA.net			
<b>Gazette</b>			
Gazette Notice uploaded			
<b>Seek Website</b>			
Date draft uploaded			
<b>Newspapers/Print Media</b>			
Date Adcorp contacted			
Date Adcorp approved and advised			

Processed by	Jenna Brandon
Advertising Confirmation email sent	Jenna Brandon

Date	11-9-13
Date	12-9-13

# Expression of Interest - Internal

## Request to Advertise Form



### Instructions:

To arrange recruitment advertising, the following are required to be emailed to the HR Services Inbox ([humanresources@dha.gov.au](mailto:humanresources@dha.gov.au))

- A completed 'Request to Advertise Form' with delegate approval.
- An approved duty statement and selection criteria emailed in word format.

### Timeframes:

- Once the completed form and attachments are received by HR Services, there is a one week (5 business days) turnaround time for the advertisement to go live.
- You are able to request a future advertisement date on your application if you do not want it listed straight away.

Position/s Details	
Requesting officer's name:	Jason Netting
Requesting officer's position title:	Sales Business Manager
Requesting officer's phone number:	(02) 6270 6072
Position Business Unit:	Sales, Marketing and Portfolio Management
Position location:	Head Office - Barton
Position title:	Relationship Manager
Position number/s:	TBA
Classification / Level:	DHA Level 6
Is the position full time or part time?	Full time
If part time please state hours per week:	
Type of vacancy:	Non-ongoing
Length of Non-Ongoing contract: (If applicable)	12 Months (maximum 12 months)
Contact officer's name:	Jason Netting
Contact officer's position title:	Sales Business Manager
Contact officer's full phone number:	(02) 6270 6072
Contact officer's email for queries:	<a href="mailto:jason.netting@dha.gov.au">jason.netting@dha.gov.au</a>
Postal address for applications:	26 Brisbane Avenue, Barton, ACT, 2600
Closing date for applications:	<del>2 weeks</del> 1 week



## Request to Advertise Form

Advertisement Details (When and where would you like the position to be advertised)		
Type of recruitment action	Internal	
Is there a particular date you would like the advertisements to go live if outside normal turnaround times?	Yes	12/09/2012
For External Recruitment:		
Commonwealth Gazette (APSJobs) (Required for ongoing, optional for non-ongoing)	No	
Seek website	No	
Other website (Please list websites)		
Press Please contact HR Services for press if required	No	
Ad Text (Description of role to be added as short description (150 characters) if using seek website)		
Notes		
Please enter any additional comments to HR Services here		
Approval		
Manager's name and title	Manager's signature and date	
Jason Netting - Sales Business Manager s47F	05/09/2013	
Delegate's name and title	Delegate's signature and date	
Tony Winterbottom - Chief Marketing Officer	<del>5/09/2013</del>	
HR Services approval and date	HR delegate's approval and date (if applicable)	
/ /	/ /	

s47F

## DEFENCE HOUSING AUSTRALIA

### DUTY STATEMENT / SELECTION CRITERIA

<b>TITLE</b>	: Relationship Manager
<b>CLASSIFICATION</b>	: DHA Level 6
<b>POSITION NO</b>	: TBA
<b>LOCATION</b>	: Head Office, Canberra
<b>RESPONSIBLE TO</b>	: Sales Business Manager

#### THE ROLE

The Relationship Manager position is located in Defence Housing Australia's (DHA's) Sales, Marketing and Portfolio Management Division. The Division is responsible for portfolio operations, investment property sales, product marketing, lessor relations, marketing communication and performance measurement.

In this role you will actively promote DHA's property investment product to prospective investors via the telephone, email and in face-to-face meetings, with a view to sell property. In doing so, you will help to ensure Corporate Plan sales targets are achieved.

You will persuade and influence prospective investors through sound communication and interpersonal skills, a strong customer service focus and be a committed team player. You will have the ability to represent DHA in a professional capacity and develop effective business relationships.

It is expected you will pursue professional development within the real estate industry. Your dedication to self development and business improvement will significantly contribute to the achievement of corporate objectives.

#### OPERATING ENVIRONMENT

This is a full-time position. DHA's core business hours are between 8.30am and 5.00pm Monday to Friday. DHA operates under flexible working hours and staff may be required to work outside core business hours at times.

DHA operates throughout all Australian states and territories, and there may be a requirement for the successful applicant to travel to other DHA offices as directed by management.

## DHA VALUES

All DHA staff are required to display the following values. You do not need to address these characteristics specifically but should keep them in mind when responding to the selection criteria below.

- Respect
- Excellence
- Integrity
- Enthusiasm
- Innovation
- Team work

## MAIN DUTIES

1. Actively promote DHA's Sale and Leaseback product to an allocated database of prospective investors via the telephone, email and in face-to-face meetings, with a view to sell property. In doing so you will aim to meet or exceed an individual sales target, contributing to the achievement of Corporate Plan sales targets.
2. Manage a database of clients and actively engage clients as required to explain DHA processes and decisions, resolve issues and sell properties; ensuring high levels of customer service at all times. Manage escalated issues as they arise as well as providing support and guidance to Sales Consultants.
3. Use DHA's web-based sales Customer Relationship Management (CRM) system to maintain the accuracy of client records, record interactions and develop targeted, influential communication.
4. Assist Sales Management and the broader sales team in its activities as required. This may include, but is not limited to, managing client databases on behalf of another consultant during periods of absence, assisting with general lead qualification and performing data integrity against DHA's other systems.
5. Maintain a well-developed understanding of the Australian residential property market, including but not limited to, supply and demand drivers, and the factual presentation of price, rent and growth predictions.
6. Establish and maintain effective and productive working relationships with DHA staff, stakeholders, contractors and third party agencies.
7. At times provide guidance and support to a small team of Sales Consultants.
8. Other duties as directed by senior management.

Specific goals against key result areas are outlined in each individual staff member's performance development agreement each year.



## **SELECTION CRITERIA**

### **Essential:**

1. Qualifications in real estate (i.e. Certificate of Real Estate or License) with proven ability to deliver outcomes while maintaining integrity and confidentiality.
2. Proven sales management experience, with the ability to support and guide a team to achieve individual and organisational sales targets through sound judgement, intelligence and common sense.
3. Well developed communication, consultation, negotiation and presentation skills, including a good phone manner and the ability to present a sales proposal via telephone or in person.
4. Proven ability to work independently, and as a member of team, to cultivate and maintain productive internal and external working relationships with a commitment to team work.
5. Proven experience in using sales management technologies, including customer relationship management systems and related databases.

### **Highly Desirable:**

6. Knowledge and understanding of DHA's core business, particularly its Sale and Leaseback product, stakeholders and customers.

## HR Delegate Sign-off Cover Page

Date provided to GM, Corporate Affairs for approval:	21/8/13
Requested date of return to HR Services by GM:	23/8/13
Requested by:	Jenna Rankin
Reason:	New position
Comments:	<p>Jason has assessed the positions within his team and since one of the Sales Coordinators has recently moved on this has given him the opportunity to create a new position without adding any FTE. New position is a DHA 6 Relationship Manager which will perform the role of a Senior Sales Coordinator and bring a level of skill and experience required for the role to add value to the team.</p> <p>Email attached from Jason Netting with further description for the new position.</p>
Delegate Comments:	<p>within budget allocation</p>
Delegate approval/signature:	s47F
Date:	

**Rankin, Jenna**

**From:** Netting, Jason  
**Sent:** Tuesday, 20 August 2013 3:13 PM  
**To:** Rankin, Jenna  
**Subject:** Relationship Manager DHA Level 6

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

Hi Jenna,

s47F

With the recent departure of [redacted] as a Sales Consultant DHA Level 5, it has given me the opportunity to bring this role back to Canberra.

Prior to this happening I had thoughts of a mini restructure to better suit the demands of our clients and offering a better/tiered level of service.

I am now seeking approval from the appropriate HR delegate for the position to be known as "Relationship Manager" DHA Level 6.

I already have approval from Tony Winterbottom to upgrade this position for the below reasons.

The thought process behind this is that we require a higher calibre of individual so we can have a tiered approach in respect to Internal Sales.

This individual will have a higher level of skills around sales management, communication, negotiation and presentation.

They will be able to be called on for guidance and support from other members of the Internal Sales team (Where I am unavailable and/or travelling)

This will be a non-ongoing position for the period of 12 months, we will then evaluate its success and the requirements for the future.

Attached is a copy of the revised position description.

Kind Regards,

**Jason Netting** | National Sales Manager  
 Sales, Marketing and Portfolio Management | Defence Housing Australia

26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mob:  
[jason.netting@dha.gov.au](mailto:jason.netting@dha.gov.au) | [www.invest.dha.gov.au](http://www.invest.dha.gov.au)

s47F

  
 Relationship  
 Manager DHA6

## Job Details

User: Jenna Brandon ^ Details

Reference No. YBC 2012

Job Status: Pending Open Date

Recruiter Notes:

+ Recruiter Files (1 file): New Relationship Manager DHA6.pdf + View

Job Name: DHA Level 6 - Relationship Manager Displayed on Job List

Highlights: Position based in Barton, ACT eg. Package neg. to \$80K  
Salary from \$76,247 to \$87,668 plus superannuation and pote eg. Fully maintained vehicle  
Non-ongoing Vacancy eg. Excellent benefits

Position on Jobs list: Optional position for a job on the candidate portal jobs list.

Job Alert Keywords:  Used in Candidate Portal Job Search and Job Alerts.

## Job Overview (Job Information Page)

Job Audiences: DHA Intranet (Default)

<P>The Relationship Manager position is located in Defence Housing Australia's (DHA's) Sales, Marketing and Portfolio Management Division. The Division is responsible for portfolio operations, investment property sales, product marketing, lessor relations, marketing communication and performance measurement.</P>

<P>In this role you will actively promote DHA's property investment product to prospective investors via the telephone, email and in face-to-face meetings, with a view to sell property. In doing so, you will help to ensure Corporate Plan sales targets are achieved.</P>

<P>You will persuade and influence prospective investors through sound communication and interpersonal skills, a strong customer service focus and be a committed team player. You will have the ability to represent DHA in a professional capacity and develop effective business relationships.</P>

<P>It is expected you will pursue professional development within the real estate industry. Your dedication to self development and business improvement will significantly contribute to the achievement of corporate objectives.</P>

<P><B>A 12 month non-ongoing vacancy is available.</B></P>

<P><B>To apply</B> apply for this position please submit a two page cover letter outlining your suitability to the role by addressing the selection criteria.</B></P>

<P><B>For further information about this role please contact Jason Netting on (02) 6270 6072 or Jason.netting@dha.gov.au</B></P>

Preview Job Overview

+ Candidate Portal attachments

## User Permissions

There are no Job Permissions

+ Add New Job Permission

Page: < Prev ☐ Next >

No user or group has been granted permissions to this Job

## Additional Details

State \* ACTPostal Address for Applications 26 BrisbaneDelegates Name \* Tony WinteDelegate Position Title \* Chief MarkeContact Officers Name \* Jason NettingContact Officers Title \* Sales BusinContact Officers Email Address \* Jason.nettingContact Officers Phone Number \* (02) 6270 6Position Sales and MType of vacancy Non Ongo

Classification or Level \* DHA Level 6  
 DHA Level 2  
 DHA Level 3  
 DHA Level 4  
 DHA Level 5  
 DHA Level 6 Hold down Ctrl  
 Key (apple key for Mac users) to  
 select options

Location Adelaide

s47F

12/9/13

## View/Edit Job

&gt; Job Card &gt; Applicant List &lt; Back

## Application Form - TBC

Give Feedback

Recent Candidates / Groups

+ Preview Application Form [DHA Intranet]

View [Question Text]

> Add New Form Step  
> Add a Custom Question

Step	Order	Move	Question (* Displayed on Applicant Card, ^ Hidden Question)	Action
Step 1 - PERSONAL DETAILS   Edit Step   Add Question To This Step   Add Global Question				
		down		
	1	down	[g] Given Name/s	Edit   Delete
	2	up down	[g] Preferred Name:	Edit   Delete
	3	up down	[g] Surname:	Edit   Delete
	4	up down	[g] Street No:	Edit   Delete
	5	up down	[g] Street Name:	Edit   Delete
	6	up down	[g] Town/Suburb:	Edit   Delete
	7	up down	[g] State:	Edit   Delete
	8	up down	[g] Postcode:	Edit   Delete
	9	up down	[g] Preferred Contact Number:	Edit   Delete
	10	up down	[g] Alternate Contact Number:	Edit   Delete
	11	up down	[g] [p] Australian Citizenship is required for employment in DHA, except in exceptional circumstances. In such cases, employment of a candidate with Permanent Residency may be considered, conditional upon the candidate being granted Australian Citizenship within a certain timeframe. Are you an Australian Citizen?	Edit   Delete
	12	up down	[g] [c] Do you have permanent resident status?	Edit   Delete
	13	up down	[g] [p] How did you hear about the vacancy?	Edit   Delete
	14	up down	[g] [c] If Press, please specify:	Edit   Delete
	15	up down	[g] [c] Please specify, if other selected:	Edit   Delete
Step 2 - EMPLOYMENT DETAILS   Edit Step   Add Question To This Step   Add Global Question				
		up down		
	1	up down	[g] [p] Have you previously been employed by DHA?	Edit   Delete
	2	up down	[g] [p] Are you currently employed?	Edit   Delete
	3	up down	[g] [c] Name of current employer:	Edit   Delete
	4	up down	[g] [c] Current Supervisor's Name:	Edit   Delete
	5	up down	[g] [c] Current Supervisor's Contact Number:	Edit   Delete
	6	up down	[g] [c] Previous Supervisor's Name:	Edit   Delete
	7	up down	[g] [c] Previous Supervisor's Contact Number:	Edit   Delete
Step 3 - EMPLOYMENT IN THE AUSTRALIAN PUBLIC SERVICE (APS)   Edit Step   Add Question To This Step   Add Global Question				
		up down		
	1	up down	[g] [p] Are you currently working in the APS?	Edit   Delete
	2	up down	[g] [c] Employment Status:	Edit   Delete
	3	up down	[g] [c] APS Classification Level:	Edit   Delete
	4	up down	[g] [c] APS Department / Agency:	Edit   Delete
	5	up down	[g] [p] Have you received (or are expected to receive) a redundancy or retrenchment benefit from a Commonwealth employer?	Edit   Delete
	6	up down	[g] [c] Date received or expected to receive:	Edit   Delete
	7	up down	[g] [c] Department or Agency:	Edit   Delete
	8	up down	[g] Have you been terminated from the APS for a breach of the Code of Conduct?	Edit   Delete
Step 4 - COVER LETTER   Edit Step   Add Question To This Step   Add Global Question				
		up down		
	1	up down	Please upload your two page cover letter outlining your suitability to the role by addressing the selection criteria here:	Edit   Delete
Step 5 - REFEREES   Edit Step   Add Question To This Step   Add Global Question				
		up down		
	1	up down	[g] Name:	Edit   Delete
	2	up down	[g] Position Title:	Edit   Delete
	3	up down	[g] Company Name:	Edit   Delete
	4	up down	[g] Contact Number:	Edit   Delete
	5	up down	[g] Name:	Edit   Delete
	6	up down	[g] Position Title:	Edit   Delete
	7	up down	[g] Company Name:	Edit   Delete
	8	up down	[g] Contact Number:	Edit   Delete
Step 6 - DECLARATION   Edit Step   Add Question To This Step   Add Global Question				
		up		
	1	up	I declare that the information provided in this application, including any attachments to be true and correct:	Edit   Delete

12/9/13 S47F



Position for



## **Business Case Remuneration (REM) Form Attachment**

### **Purpose**

This document is an attachment to the Remuneration (REM) Form to support the recommended recruitment process or extension request as a result of the interim recruitment arrangements.

### **Key Issues / Justification**

- Confirm that a review of the level of the position has occurred.
  - New position.
- Outline why the position is critical. For example, what would the impact be to the business if the position is not filled?
  - Successful and premium delivery of seminar program
  - Increased SMSF exposure and sales.
  - Ensuring the SLB BAU target and MCA targets are met.
- Is the position new or existing? If existing, how long has the position been vacant?
  - New
- If extending a non-ongoing contract, why is the non-ongoing staff member required in the position (and not advertising to potentially displaced staff).
  - N/A
- Are there any alternatives that could provide a suitable outcome?
  - No

### **Consultation**

Consultation with Daniel Carton (Head of Sales & Portfolio Management).

Elvio Bechelli (GM, Portfolio Management, Marketing & Strategic Projects)

Madeline Dermatossian (COO)

Please see email trail attached.

Position

## Business Case

### Remuneration (REM) Form Attachment

#### Purpose

This document is an attachment to the Remuneration (REM) Form to support the recommended recruitment process or extension request as a result of the Interim recruitment arrangements.

#### Key Issues / Justification

- Confirm that a review of the level of the position has occurred.
  - The current position is a Level 6 and will remain at this level.
- Outline why the position is critical. For example, what would the impact be to the business if the position is not filled?
  - The internal sales team would be greatly boosted by the skills and expertise of . Targets for the 2014/2015 FY would struggle to be met for the sale & leaseback program.  
s47F
- Is the position new or existing? If existing, how long has the position been vacant?
  - Existing
- If extending a non-ongoing contract, why is the non-ongoing staff member required in the position (and not advertising to potentially displaced staff).
  - N/A
- Are there any alternatives that could provide a suitable outcome?
  - N/A

#### Consultation

In consultation with Daniel Carton (Head of Sales & Portfolio Management).

s47F



**Netting, Jason**

---

**From:** Carton, Daniel  
**Sent:** Friday, 13 June 2014 9:27 AM  
**To:** Netting, Jason  
**Cc:** Law, Emma  
**Subject:** s47F costs

Jason, s47F

For cost comparison purposes with potentially  
see the following:

s47F

Cheers  
Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

26 Brisbane Avenue Barton ACT 2600  
Tel: 02 6270 6039 | Fax: 02 6222 2269 | Mob:  
[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

## SLB REVIEW

### INTERIM REPORT

#### Purpose

The purpose of this report is to detail the findings and opportunities from the SLB Review.

#### Background

##### The Review

The COO requested a review of the SLB program. Though there was an internal audit of the SLB program by KPMG in 2012, the program has not been extensively reviewed internally in recent corporate memory.

The Review Process consisted of the following steps in approximate order:

- Questionnaires completed by Sales Consultants
- Questionnaires completed by Sales Coordinators
- Interviews with Sales & Portfolio Management senior managers
- Senior SLB team workshop
- Interview with the COO
- Interviews with COO direct reports and other Executive stakeholders including CIO, CFO and General Manager Finance
- Interviews with other key stakeholders including Marketing Communications, Lessor Relations, Leasing, Investment Management and the MCA Project.

All interviews were conducted by Elvio Bechelli, General Manager Portfolio Management, Marketing & Strategic Projects and Dan Carton, Head of Sales & Portfolio Management.

##### The SLB Program

The SLB program serves the dual purpose of being the key funding source for DHA through the sale of DHA properties to investors and also meeting provisioning requirements of Defence through the simultaneous leaseback of these properties by DHA.

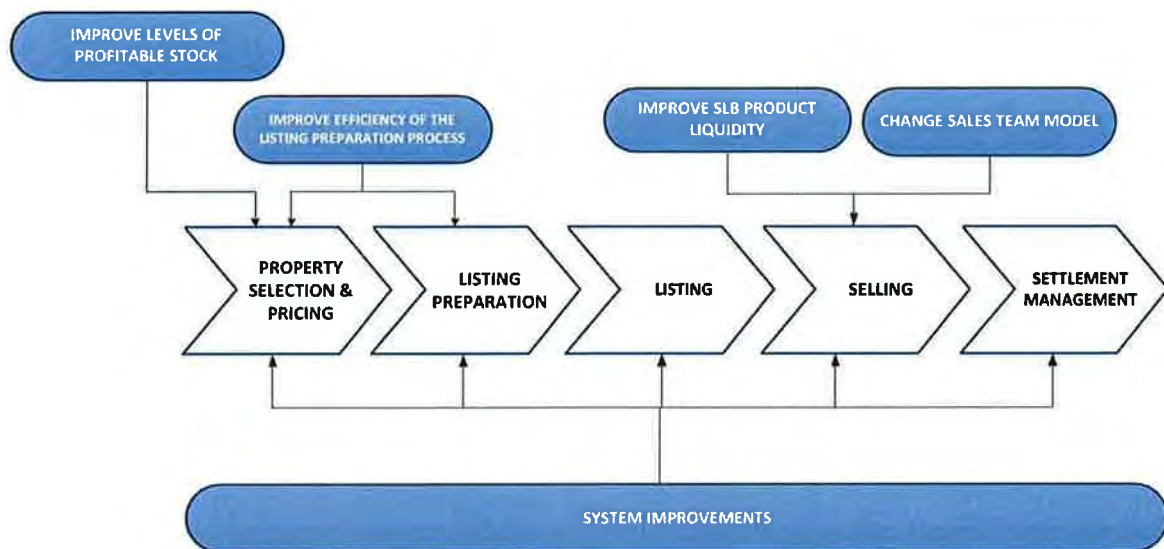
The program also optimises shareholder returns by targeting a net sales margin of 5%. In 2013/2014, the budget for revenue from SLB is \$380 million from the sale of approximately 741 properties.

There are currently almost 1000 properties in the inventory portfolio and around 2500 properties in the investment property portfolio with total market value of almost \$2bn. On average, properties are held for 24 months prior to being sold. This allows for capital growth and maximises benefits to investors by ensuring depreciation benefits remain available.

## EXECUTIVE SUMMARY

Many findings and opportunities have been identified across the process. The headline findings and opportunities that have emerged are as follows:

- **Change the Sales Team Model** to reduce cost, reflect skill requirement, reduce referral risk and drive a “client first” culture
- Improve efficiency and reporting, and reduce risk with targeted **Systems Improvements**
- **Improve Product Liquidity** by introducing a supported referral process for mid-lease sales
- **Improve levels of Profitable Stock**
- **Improve the efficiency of the Listing Process**



## SLB Report

Findings and opportunities are mapped against the key stages of the SLB process (note headline findings are in bold):

### 1. Property Selection

#### 1.1 IMPROVE LEVELS OF PROFITABLE STOCK

**Finding:**

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Currently there is no property-by-property profitability on the supply chain particularly within DHA's developments. The ability to forecast and identify future profitable properties is limited.

**Opportunity:**

A cash profit field will be added to both the production model and the price submission template. Annual SLB Portfolio Planning Day – this is an annual executive level forum to discuss the state of the SLB portfolio. Already held once, the opportunity may exist to role out an operational national manager presentation across the business. This will broaden the understanding of the state of the portfolio and help inform better decision making.

Production Model expansion – this includes capturing supply chain property and financial details on a property-by-property basis. This will dramatically improve DHA's ability to forecast, identify future profitable properties, and conduct analysis on the capital side of the business including feasibilities.

Further reporting and analysis to examine provisioning profitability trends – provisioning type, bulk versus single, levels of impairment, comparisons to recorded market growth.

Improve level of SLB Feedback reporting to other parts of the business to inform better decision making. *Also see final Finding & Opportunity under Property Selection.*

## 1. Property Selection

### 1.2 PROPERTY MIX – 3 v 4 BEDROOMS

**Finding:**

Property Provisioning -60% of stock is 4 bedrooms but Defence requirement is only 20%. PPG continue to develop 4 bedrooms on the understanding that these achieve a better margin through SLB.

SLB do have a preference for 4 bedroom stock. However this preference is not a dogmatic 100% need for 4 bedroom stock. SLB is more than open to 3 bedroom stock.

PPG include 4 bedroom stock in project feasibilities as returns are higher. The recent Greenfields acquisition in Raceview was for all 4 bedroom stock.

**Opportunity:**

DHA needs to better balance investor demand with defence requirement. DHA needs to do more analysis and share results to understand what stock should be delivered based on Defence requirements.

Three bedroom stock are feasible from a margin and saleability perspective if they are built on appropriate land i.e. 4 bedroom home on a large block will suit more than a 3 bedroom home on a large block. DHA's developments should reflect this need for more 3 bedroom homes with smaller lot sizes.

## 1. Property Selection

### 1.3 SLB PERFORMANCE FEEDBACK TO PPG

**Finding:**

PPG advised they would like more feedback from the SLB team in regard to whether properties acquired were a success or if there were issues with the properties in terms of suitability for SLB program.

**Opportunity:**

By providing feedback to PPG on issues experienced with properties during the SLB process DHA can better inform the acquisition process to satisfy SLB requirements in regard to the suitability of properties for SLB. A regular report will be designed to meet this need.

This will also be extended to providing regular feedback to those in the regions providing recommended pricing i.e. feedback to them on what the final pricing was and the sales & bidding result.

Regular reporting of regional portfolio profitability to both PPG and the HMC staff will improve awareness and understanding of the business.

## 2. Pricing

### 2.1 THE VALUE OF THE DHA SLB LEASE

**Finding:**

The value of the lease is not considered when determining the price of the SLB property. The DHA lease is a long term lease with government guaranteed cash flows, better tenants, end of lease restoration provisions and is therefore, in most market conditions, superior to other residential leases.

**Opportunity:**

The lease should be independently valued. The value should be communicated to investors to demonstrate the superior characteristics of the product. This value should be used as input when setting the price of the product.

The standard SLB valuation request will be augmented to include the requirement for a valuation that factors in the lease. This new valuation will be added to the pricing template to inform pricing decisions.

## 2. Pricing

### 2.2 OPTIMAL PRICING

**Finding:**

An issue was raised as to whether SLB prices are set high enough. The basis for this concern was that SLB does not use auctions and a lack of understanding about the pricing process.

**Opportunity:**

There is an opportunity for better communication to the rest of the business about the pricing methodology and the ballot process (and its role in informing pricing). A DHA News article will be drafted to introduce the business to the pricing process.

DHA does not auction SLB properties. The simplicity of a fixed price model aside, the primary reasons are to minimise impact on DHA tenants and the fall-over rates of sales. Auctions require sales to unconditionally exchange at the auction. This would necessitate the due diligence by the prospective buyers "plural" being done pre-auction increasing impact on the tenant i.e. visualise 30 parties wishing to check a house out and complete building and pest inspections pre-SLB auction in the current market. The current model allows the one successful buyer to do their due diligence after securing the property but before going to exchange.

Whether through an auction or some other means of bidding up prices, there is a risk of fall-over as people have bid up to secure the property thus widening the gap between the valuation and the final price.

To ensure optimal pricing, up-to-date bidding activity as well the normal pricing parameters such as valuation, cost and recent sales activity are used. Pricing must not prioritise short term isolated

gains ahead of the programs reputation and long term success. DHA does not want to further compound the perception that properties are over-priced.

## 2. Pricing

### 2.3 VALUATIONS TIMEFRAMES DELAYING PRICING (Improve Efficiency of Listing Process)

#### Finding:

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#### Opportunity:

Summarise issues and work with Finance to try and improve valuation turnaround times.

Ideally, the complete turnaround time including review and clarification should take five business days as per stated internal service levels.

## 3. Listing Preparation & Listing

### 3.1 (Improve Efficiency of Listing Process)

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#### Finding:

#### Opportunity:

Whenever PPG handover a property to P&TS, a zero-error Quality Assurance process is required. Property information at handover includes occupation certificates, floor plans and photographs. This



will prevent delays in listing properties and therefore make the SLB process more efficient. It will also reduce the risk that for allocation purposes, incorrect information is being shown to prospective tenants.

### 3. Listing Preparation & Listing

#### 3.2 DISPLAY OF SALES ACTIVITY ON DHA WEBSITE

**Finding:**

The website does not include details of properties that have been sold. The website only displays properties currently listed and those awaiting listing. This limits the public's visibility at any given time of the range of properties DHA sells.

**Opportunity:**

Reinstate properties remaining on the website when they are still at the stage of "on hold". When the new website was released in early 2013 this was removed. This issue has been raised with BS&T and resolution is anticipated by the end of the financial year.

There is also an opportunity to investigate other property information DHA could make available to investors such as a history of properties sold and a sales price range. This would enhance the buyer's knowledge and improve their decision making process and align DHA's website more closely with other property websites e.g. Domain.

### 3. Listing Preparation & Listing

#### 3.3 PROFESSIONAL PHOTOS

**Finding:**

Historically SLB properties have been listed with a professional photo of the front of the house only. The balance of the photos used for listing are those taken by PPG at handover of the property. Professional photos of all elements of properties have been taken since August 2013. This was an outcome of the July 2013 Portfolio Operations annual workshop and was an exercise in raising the standard of DHA SLB sales to be in line with market practice.

**Opportunity:**

Planning for the tender for a panel of professional photographers is underway. Loading of accumulated whole-of-house professional photos to date are being loaded onto Homefind by P&TS.

In parallel with the tender, formal handover procedures will be amended to realise efficiencies and save PPG from having to allocate resources to take internal photos.



### 3. Listing Preparation & Listing

#### 3.4 PROPERTY DESCRIPTIONS TO REFERENCE DEVELOPMENT AWARDS

**Finding:**

DHA has a separate marketing for each of its major developments. Many of DHA's developments, from which SLB stock come from, have won awards.

**Opportunity:**

Project already exists to incorporate these elements into the SLB listing guidelines. This project will be expedited. Links to development websites will be included immediately.

### 4. Sales

#### 4.1 SALES TEAM

**Background:**

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#### 4.1 SALES TEAM

##### 4.1.1 MISALIGNMENT BETWEEN REQUIRED SKILLSET AND CONTRACTOR PAYMENT

**Finding:**

While the majority of external sales staff have a real estate background, the requirement for this role is very different from a real estate agent. The sales contractors do not have to source properties, manage vendor expectations, pricing, market the property, perform open houses or negotiate sales outcomes. The key skill is customer relationship management and knowledge of the DHA sales process to manage leads provided and guide the investor through the sales process. This is evidenced by DHA's highest selling sales agent who had a minimal real estate background and who previously worked in an administration role in a HMC.

Due to the strong demand for DHA properties across the country and across the property cycle, there is a strong perception that there is very little "selling" done by the sales team and they are simply "order taking". In the current strong market this perception is asserted by the data.

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#### 4.1 SALES TEAM

##### 4.1.2 REFERRAL RISK

**Finding:**

There exists both an identified risk and anecdotal evidence of DHA clients being referred to brokers, solicitors and mid-lease sales.

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## 4. Sales

### 4.2 LOW SLB PRODUCT LIQUIDITY

**Finding:**

The liquidity of the SLB product is very low due to DHA not offering a mid-lease (or secondary) sales service to investors that seek to sell their property before the end of the lease term. The DHA lease remains “bolted” to the property title until the lease expires. This makes selling the property mid-lease challenging through a local real estate agent. There are approximately 80-100 secondary sales per annum.

This had lead to the emergence of businesses that appear to represent themselves as DHA in the market selling DHA properties mid-lease. This creates risk for the DHA and DHA SLB brand as these businesses may make false representations to investors, and may offer a sub- standard of service and communication.

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**Opportunity:**

DHA can enhance the liquidity of the SLB product by offering to arrange the sale of their property should they decide to sell during the lease term. DHA has negotiated favourable competitive commission rates with its panel of disposals real estate agents that will be honoured for DHA clients referred to them. This initiative would also assist in eliminating businesses that may seek to represent themselves as being aligned to DHA that currently sell these properties that may lead to reputational issues to DHA. There is also a benefit to prospective investors seeking to acquire a DHA property but have been unsuccessful due to strong demand.

DHA would support a successful sale by the real estate agent by a small highly targeted marketing campaign to the DHA database. This also provides extra work for panel agents further consolidating DHA's ability to secure market beating commission rates for the Disposals program.

The establishment of this capacity will enable DHA IML, should it choose to use the service, to efficiently sell down its property funds at the end of the fund life.

## 4. Sales

### 4.3 SEMINARS

**Finding:**

The material and format of DHA's SLB seminars has not been subject to a major review.

Registrations are robust but in some instances attendance is poor. There were 67 seminars delivered in 2013 primarily in licensed clubs such as RSL clubs. The average seminar attendance was 59 registrations and 32 attendees (59%).

Audience reach is limited to where we hold the seminars. We do not conduct webinars.

The Focus Series events organised by Marketing recently held in Melbourne and Sydney were poorly attended despite full registration of available places.

The Seminar program is currently on hold pending the review.

**Opportunity:**

A comprehensive review is underway of every facet of the seminar program from locations, delivery channel, presentation format, presenters, timing, duration, partner participation, volume, and registration process. This review has commenced with an expected completion by May 2014 with seminars commencing again in June/July.

Introduce webinars to expand reach to remote areas.

Development of a pilot SMSF seminar - this has been in development for 6 months with the biggest challenge proving to be an acceptable partner for the seminar. Discussions are currently underway with Macquarie Capital to fill this seminar partner role.

Aligning DHA with industry experts such as economists or business contacts will increase the level of interest for these seminars. An example is the Focus Series with \_\_\_\_\_ that DHA are undertaking in Sydney and Melbourne. The venues are leading hotels with a target audience of 100.

Improving the Focus Series could include live webcasts to extend audience reach.

## 4. Sales

### 4.4 BALLOT

#### **Finding:**

Excessive demand for DHA properties relative to supply is causing some investor dissatisfaction. The ballot helps mitigate this dissatisfaction as clients know it is a level playing field. The anecdotal feedback about this element of the ballot from DHA clients has been very positive.

There are anecdotal reports from the sales consultants that existing lessors feel they should be exempt from the ballot.

The ballot favours investors who place multiple bids and are flexible on the location of the property. This aligns with the DHA strategy to have consultants sell clients into properties outside their home town/region.

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## 4. Sales

### 4.5 CLIENT UNDERSTANDING OF WHAT IS INVOLVED IN BUYING AN INVESTMENT PROPERTY

#### **Finding:**

There are concerns that prospective investors do not have adequate knowledge of the DHA sale process and their responsibilities of having a solicitor and finance in place. They often rely on the Sales team to provide this advice. This leads to referral risk.

#### **Opportunity:**

To better inform investors and manage expectations it would be beneficial to have information about the ballot process on the website and the sales process in terms of clearly defining the responsibilities of the investor and DHA in this process. This will make the investor aware of their obligations to have solicitor and finance in place. This section on the website will essentially be a “what to expect” for prospective buyers.

Development of the DHA Marketplace to provide investors value for money quality service across the associated services of their transaction – conveyancing, lending and insurance.

## 4. Sales

### 4.6 CONFUSION ABOUT LEASE OBLIGATIONS

**Finding:**

There has been anecdotal evidence of lessors many years after the initial purchase being confused when an annual rent review sees their rent fall. Lessors sometimes confuse rents “never” falling with never falling below the starting rent, which is a condition of the DHA lease. There is also anecdotal evidence that investors sometimes do not clearly understand DHA’s maintenance and make good obligations.

**Opportunity:**

There would be a benefit from more clearly explaining DHA’s make good obligations under the lease. This should make the sales process more efficient and enable lessors to understand DHA’s lease obligations. This information could be placed on the website and used by the sales team as a script when dealing with prospective investors.

The seminar presentation and script will be reviewed to ensure they are very clear with respect to these obligations.

## 4. Sales

### 4.7 PROVISIONING FLEXIBILITY

**Finding:**

DHA does not have a first right of refusal clause in the standard DHA lease agreement to acquire the property at the end of the lease term. It is included in the lease for DHA Residential Property Fund No. 1.

**Opportunity:**

To increase sources of properties available to DHA, where an investor wants to sell their property, DHA would have first right of refusal. This maybe during the lease term or after the lease expires. A draft of the lease with this clause included is being prepared.

## 4. Sales

### 4.8 LEVELS OF INVALID & INCOMPLETE REGISTRATIONS

**Finding:**

Registrations – 1200 per month, 300 “web-forms” per month. The web-forms are incomplete registrations where DHA is unable to make contact with the potential client. Of the remaining 900 registrations only 10%-15% of these have entered a valid phone number. These clients are contacted within 48 hours. The remainder who do not provide a phone number receive a welcome email and information. They must contact DHA to progress lead.

**Opportunity:**

Make phone number mandatory at registration to improve quality and number of leads DHA follow up. There is an expectation that this change will be implemented by the end of the financial year.

## 4. Sales

### 4.9 CALLS TO SALES LINE NOT RELATED TO SALES

**Finding:**

Internal sales team receive 30 to 50 calls per day of which 50% are not for sales team and require redirection. Examples include other DHA queues being diverted to sales queues as well as individual staff.

**Opportunity:**

Review IVR script for both DHA numbers.

## 4. Sales

### 4.10 CLIENT REGISTRATION DIFFICULT

**Finding:**

Website is difficult to navigate to allow registration. Multiply clicks and multiple pages need to be navigated by clients seeking to register.

**Opportunity:**

Redesign website to simplify registration process to increase registrations.



## 4. Sales

### 4.11 GROWING THE POOL OF SLB PROGRAM ADVOCATES

**Finding:**

DHA offer a discount of \$2500 to Defence members when they purchase an SLB property. No discount is available to DHA staff. Staff are required to obtain sign off from their chain of management to purchase a DHA property. Staff also participate in the ballot like all prospective investors.

Owners of DHA properties make strong advocates for the product's simplicity and uniqueness in the market place.

Anecdotally, the external Sales Consultants have a bias towards selling to existing lessors as it is an easier sale. Lessors already understand the product and tend to have a great financial means to secure further properties. Of properties settled YTD, 25% have been sold to existing lessors.

This logic of the easier sale is the part of reason to grow the pool of SLB advocates. When the market softens, the greater the prospective base of investors with equity and product knowledge will strengthen the sustainability and resilience of the program.

**Opportunity:**

Investigate the targeting of weekly releases to new investors only.

An alternative would be to property match to new investors with demonstrated bidding history.

Develop a staff discount and review the size of the Defence member discount.

Offer property matching for DHA staff outside the ballot process.

## 5. Settlements

No findings arose relating to the settlement process.

The SLB settlement methodology is based around a standard 8 week period from sales advice to settlement. This period is two weeks longer than a normal real estate settlement. The longer period that was established was to not "rush" the investor and allow time for the final due diligence steps that have the potential to be delayed due to the unique nature of the business e.g. gaining access at times convenient to both investor/valuer and tenant can be challenging.



## 6. Systems

### 6.1 RUNWAY (CRM)

**Finding:**

Runway is the CRM system that is used for lead management. Runway is also used to load property information onto the website. This results in duplication as this property information is already in Homefind but there is no direct link between Homefind and RUNWAY. Runway has limitations in capturing notes and limited reporting capability. The standard reports available on Runway are not producing required information and data mining capability is limited. Historically Runway had stability issues but this was rectified by BS&T three years ago by moving RUNWAY across to an Oracle-based platform.

**Opportunity:**

To enhance efficiency, the strategy is to reduce the functionality of Runway and restrict its use to opportunity management. Property information loaded on Runway for the website will be taken from Homefind eliminating duplicate processes. This is estimated to be a three month project.

*Timing to come from BS&T*

To enhance reporting functionality, information stored on Runway relating to lead management will be loaded in BI that has a stronger reporting capability.

The functionality relating to the recording and retrieval of notes contained in Runway will remain in this system but will be reviewed by BS&T to assess if this process can be enhanced.

## 6. Systems

### 6.2 SLB TRACKING

**Finding:**

The SLB tracking process is not yet managed through a workflow tool as is the case with disposals. This delay has been due to outstanding issues relating to security, functionality and duplication.

**Opportunity:**

Pending resolution of security and functionality issues and the linking of Homefind property data to Runway, the move to Workflow for SLB is essential.

Efficiencies can be gained and risk minimised by eliminating the need for excel spreadsheets, enhancing authorisation processes and security over access to information, and an improvement in reporting & audit functionality.

## 6. Systems

### 6.3 PRODUCTION MODEL

**Finding:**

A production model is maintained by the Portfolio Management team that downloads information from production systems into an excel spreadsheet. The Production model is used by SLB for the purpose of selection of properties for SLB and facilitating the pricing process. It is also used for Disposals pricing and overall Portfolio Management.

The production model contains the details of the property, the status of the property, valuation, historical and current costs, sales price and profitability information used in the pricing and selection process.

Historical information on Excel Property spreadsheet is maintained periodically.

**Opportunity:**

This current excel-based approach is not preferred due to key person risk and lack of robust user-friendly historical tracking. To improve efficiency and have common one-source-of-truth reporting system for DHA portfolio, the Production Model will be built into BI. This will improve efficiency and will mean the Production Model is always “live” and up to date.

The replacement of the production model is underway and is expected to take six months.

This will include the expansion of the production model to capture the PPG supply chain on a property by property basis.

A full list of systems and their purpose can be found at Appendix 4.

## 7. Benchmarking

### 7.1 SELLING EXPENSES

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## 7. Benchmarking

### 7.2 DURATION OF SLB PROCESS (Improve Efficiency of Listing Process)

**Finding:**

The SLB process takes 114 days or 3.7 months. As a benchmark, the sales process for disposals takes on average 5.1 months but has a median of 3.7 months which is comparable to SLB. Listing preparation process takes 42 days. This process includes valuation and obtaining all necessary property information to enable listing. If one compares the components of the process that would be undertaken by a real estate agent conducting an auction, the listing and selling would take 5 weeks, compared to DHA's listing and selling timeframe of 14 days. RP data for average time listed for a property is 1.9 months. DHA SLB timeframes compare favourably.

**Opportunity:**

The selling process is very competitive in terms of duration and the settlement process has defined period for specific reasons. There are opportunities to improve the average time it takes to prepare properties for listing.

It is estimated that the process to list properties could be reduced from 42 days to around 28 days through the implementation of stronger quality assurance checks by PPG to ensure the property file is complete and correct at the time of handover and with the possibility of some improvement in valuation turnaround times.

The four factors that impact on the duration it takes to get a property ready for listing are as follows:

- Volume of properties being prepared at the time
- Correctness and completeness of the property file
- Awaiting contracts (not all jurisdictions)
- Valuations Turnaround

The overall process could be more efficient through the implementation of workflow. This is covered in the systems recommendations.

More details on the stages of the SLB process are contained at Appendix 1.

## Appendix 1

The SLB process takes on average 114 days from property selection to settlement. The key steps in the SLB are as follows:

Property selection – on a fortnightly basis, a review of DHA inventory /investment short term stock is conducted to identify properties suitable for SLB. Selection process considers financial hurdles, saleability of stock, progress towards revenue and profit targets, diversity of stock based on location and yield, and limiting supply to maintain competitive pressures.

Pricing – is set via recommendations by the Sales Portfolio Manager and approved by COO. Nine sources of information are considered when setting price including independent market valuations, recent sales history, investor sentiment and recommendations from HMC managers and the National Sales Manager.

Listing Preparation – prior to listing a property, property information is obtained including floor plans, building occupancy certificates, contracts in some jurisdictions, depreciation schedules and photos. This information is loaded into Runway to enable the Sales team to manage leads to enable access by investors.

Listing – After all property information is reviewed and quality checked twice for accuracy, the property is listed on the DHA website. Properties are “pre-released” for viewing on a Friday, becoming available for sale at midday the following Thursday.

Selling – Properties are sold through a ballot process, utilising an algorithm that progressively allocates properties to investors on a random basis starting with properties with the lowest number of bids and progressively working through up to properties with the highest number of bids. Investors with multiple bids are eliminated once the algorithm allocates them a property. The process favours investors that submit multiple bids across the portfolio properties listed, particularly properties receiving lower numbers of bids. Where investors demonstrate that they have been unsuccessful through the ballot process on a number of occasions and they have submitted a multiple bids on each occasion, Sales Team management will offer a property to these investors outside of the ballot process.

Settlement Management- once the investor is committed to proceeding, the property goes from being on hold to at “Sales Advice”. This is when instructions are issued to solicitors. This is issued with a standard 8 week settlement period. This allows investors time to complete their due diligence which for example, could include a pest & building inspection and valuations for finance purposes.

## Appendix 2 – Benchmarking Duration

SLB Benchmarking 12/13 and 13/14 YTD

	Pricing	Preparing for Listing	Selling	Settlement	TOTAL
SLB (days)	18	31	18	42	98
Disposals (days)	NA	24	25	47	111
External (days)	NA	NA	57	NA	NA

Pricing is defined as price requested through to price approved

Pricing is a subset of the Preparing for Listing data

Preparing for Listing is defined as price requested through to Quality Checked

Selling is defined as Quality Checked through to Sales Advice

Settlement is defined as Sales Advice through to settlement.

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## **Appendix 4 – SLB Systems**

Current systems and their purpose used for SLB are as follows:

- Excel (tracking and planning)
- Runway (listing on the website and CRM)
- HSM (property & maintenance information)
- Homefind (photos & floor plans)
- CLM (lessor information)
- PMS (property information)
- JIRA (property information)
- Workflow – currently used only for Disposals



**Netting, Jason**

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**From:** Bechelli, Elvio  
**Sent:** Thursday, 3 April 2014 10:35 AM  
**To:** Carton, Daniel  
**Cc:** Netting, Jason  
**Subject:** RE: Sales Team Update

Dan

Have discussed with Madeline. Based on sales results and other ratings, I am ok  
 s47F

I am not convinced that

On this basis, I only approve that s47F

Rgds  
 Elvio

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**From:** Carton, Daniel  
**Sent:** Tuesday, 25 March 2014 4:37 PM  
**To:** Bechelli, Elvio; Netting, Jason  
**Cc:** Law, Emma  
**Subject:** RE: Sales Team Update

Elvio,  
 s47F

See sales consultant ratings... the contractors identified in red are those identified not to be offered a contract.

Available funding for new contractors... \$180k left for this year based on estimated retainer through to the end of the year.  
 s47F

Regards  
 Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6039 | Fax: 02 6222 2269 | Mob:  
[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

<< File: Sales Consultant Rating.xlsx >>

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**From:** Carton, Daniel  
**Sent:** Friday, 21 March 2014 3:55 PM  
**To:** Bechelli, Elvio; Netting, Jason  
**Cc:** Law, Emma (Emma.Law@dha.gov.au)  
**Subject:** RE: Sales Team Update

Elvio,

s47F

Re: the consultants that have been identified for non-contract renewal... I will organise for the consultant assessment that was done in January (with descriptions for each assessment category) to be sent through to you.

I will also put the budget position together Monday re: capacity to afford starting in May.

Thanks  
Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

26 Brisbane Avenue Barton ACT 2600  
Tel: 02 6270 6039 | Fax: 02 6222 2269 | Mob:  
[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

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**From:** Bechelli, Elvio  
**Sent:** Friday, 21 March 2014 2:56 PM  
**To:** Netting, Jason  
**Cc:** Carton, Daniel  
**Subject:** RE: Sales Team Update

Thanks Jason.

I will need to discuss this with Madeline. To do so I need reasons why we are not renewing these contracts.

In regard to sales staff coming on board I need confirmation that their costs will be within budget.

Rgds  
Elvio

---

**From:** Netting, Jason  
**Sent:** Friday, 21 March 2014 1:36 PM  
**To:** Bechelli, Elvio  
**Cc:** Carton, Daniel  
**Subject:** Sales Team Update

Hi Elvio,

Thank you our discussions yesterday and the clarity you have provided us with.

It is now our understanding that DHA do not wish to quickly change the current sales model. Any material changes to the sales model would be contingent on the demonstrated sales success of the internal sales team.

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This would not be an added cost, rather a bring forward of payments that would have been paid over the next 3 months.

Kind Regards,

**Jason Netting** | National Sales Manager  
Sales & Portfolio Management | Defence Housing Australia  
26 Brisbane Avenue Barton ACT 2600  
Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mobile:  
[jason.netting@dha.gov.au](mailto:jason.netting@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

**Netting, Jason**

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**From:** Carton, Daniel  
**Sent:** Thursday, 19 December 2013 3:32 PM  
**To:** Robinson, Rachelle; Netting, Jason; Law, Emma; Molloy, Michael  
**Subject:** FW: Draft SLB Review Plan

FYI – nice!

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6039 | Fax: 02 6222 2269 | Mob:  
[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

---

**From:** Bechelli, Elvio  
**Sent:** Thursday, 19 December 2013 3:28 PM  
**To:** Carton, Daniel  
**Subject:** RE: Draft SLB Review Plan

Dan,

This is a good approach. I have following suggestions:

1. We should also interview Madeline to get any suggestions on improving the process
2. The scope of the review should include assessing the effectiveness of the sales team and options for improvement/alternate models.
3. Review bidding process and assess fairness of algorithm process. Key concern is managing people that are unsuccessful.
4. Adequacy of reporting systems for effective decision making – what critical info are we missing
5. Efficiency – what processes can we automate/streamline
6. What do we need from other teams to operate more efficiently

Review your timetable to ensure that interview/surveys can be completed within timeframe as key people may be on leave in January.

Rgds  
 Elvio

---

**From:** Carton, Daniel  
**Sent:** Thursday, 19 December 2013 11:06 AM  
**To:** Bechelli, Elvio  
**Subject:** Draft SLB Review Plan

Elvio,

See below... some food for thought over the Christmas break.

Happy to discuss and refine as required.

Regards  
Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

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## Draft SLB Review Plan

Proposed Project Manager – Jaime Shields (Portfolio Business Manager – currently on leave)

### THE REVIEW LOGISTICS

The review will consist of the following:

1 Interviews to be conducted by Elvio and Dan with:

- Senior Sales & Portfolio Manage staff including the following
  - Emma Law
  - Michael Molloy
  - Jason Netting
  - Rachelle Robinson
- Key Senior Managers from across DHA including the following:
  - A sample of HMC Managers e.g. Bob Haylett (Townsville) and Bryan Slattery (Sydney)
  - National HMC Managers – Michael Kelly and Kelly Hunter
  - Daniel Jones & Jon Brocklehurst (Finance)
  - Brett Jorgensen (Property & Tenancy)
  - Michael Griffiths (Lessor Relations)
  - John Dietz (PPG)
  - Paulina Manenica (Leasing)
  - Rob Lafreniere (MCA)
  - Shane Nielsen & Mike Hehir (BS&T i.e. IT)
  - Natalie Cooper & Sarah Tyrrell (Marketing Communications)

2 Short surveys/questionnaires to the following recipients:

- Panel solicitors
- Sales Consultants (Internal and external)
- Sample of sales coordinators

### SUBJECT MATTER

Interview questions/structure and surveys/questionnaires will be customised to each interviewee & recipient based around the following topics:

- SLB Product (lease terms, management fees etc)
- Client Management
- Information Management
- Reporting
- Property Selection & Pricing
- Ballot
- Settlement Management
- Tenant Impacts
- Listing Administration

### PROPOSED TIMING

- Interviews and surveys complete by end of January 2014
- Draft report complete by mid-February 2014
- Presented to the EPC in late February 2014.

## Netting, Jason

---

**From:** Bechelli, Elvio  
**Sent:** Thursday, 17 April 2014 11:35 AM  
**To:** Carton, Daniel  
**Cc:** Netting, Jason  
**Subject:** RE: Contract Schedule

Dan,

Approved in principle s47E (c) and also debriefing/assessing on how negotiations go with first two sales contractors.

Rgds  
 Elvio

---

**From:** Carton, Daniel  
**Sent:** Thursday, 17 April 2014 11:22 AM  
**To:** Bechelli, Elvio  
**Cc:** Netting, Jason  
**Subject:** Contract Schedule

Elvio,

As discussed, please approve the following in principle:

s47E(c)

Regards  
 Dan

**Dan Carton | Head of Sales & Portfolio Management**  
**Defence Housing Australia**

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s47F

# Memorandum



To: Jon Brocklehurst  
Chief Financial Officer

From: Madeline Dermatossian  
: Chief Operating Officer

Cc:

Date: 21 November 2013

---

Subject: Additional FTE to support restructuring of the Sales Team

---

## Purpose

To seek approval for fourteen additional FTE to support the restructure of the Sales & Leaseback (SLB) Sales Team.

## Background

DHA has a Sales Team consisting of 11 external sales contractors and 4 internal staff.

The current model has created some cultural issues and some areas of risk for DHA:

- Excessive focus on contractor equity and rewards rather than a focus on the client.
- Misuse of client details – examples in the past of misuse in pursuit of extra personal financial reward by the contractors.
- Referral risk – both solicited and unsolicited clients referred to brokers or solicitors with risk of "kick-backs"
- Contractors are also working from home (or remotely) therefore a divide has developed between internal and external stakeholders.

## Objectives

The high level objectives of this restructure are as follows:

- To develop a "Client First" culture in the Sales team
- Reduce Costs
- Recruit surplus DHA staff from the consolidation of the housing allocation functions.
- Be prepared and resourced to cover any increases in the SLB revenue target.

## Plan Overview

- Converting external contractors into Internal FTE will reduce costs and removing the commission structure to allow the client to become the primary focus
- Target the best six contractors to transition into DHA employees. Those six would be known as Relationship Managers (DHA6). There is one existing Internal Relationship Manager.
- Six Sales Officers (DHA4/5) to support each individual Relationship Manager.
- Two Support Officers (DHA3/4) to manage the cold database, all admin tasks, and the National Sales queue.



# Memorandum

- Recruit a Presenter who would present the seminar program and also provide support to the program as Relationship Manager/Sales Officer.
- Recruit a Quality Manager who would manage all Sales and Support Officers as well as implement training program.
- Upgrade current Internal Relationship Manager DHA6 to Senior Relationship Manager EL1 who would manage all the Relationship Managers.

**See Attachment 1 for Current v Proposed Team Structures**

**See Attachment 4 for SLB Sales Team Proposed Roles**

## Cost Savings

	Current		Proposed	
	People	Cost	People	Cost
External	11	2,073,429	-	-
Internal	4	470,875	18	2,043,875
Total	15	2,544,304	18	2,043,875
Cost per person		169,620		113,549
Saving Per Head				56,072
Total Saving				500,429

See Attachment 2 for detailed current costs

See Attachment 3 for detailed proposed costs

## Implementation

Stage	Time	Details
1	Mid-Feb 2014	<b>Recruit Sales Officers</b> <b>Recruit Support Officers</b> Surplus staff from the consolidation of housing allocation functions will be priorities of this internal recruitment drive
2	Mid-March 2014	<b>Recruit Presenter</b> <b>Recruit Quality Manager</b>
3	Mid-March 2014	<b>Upgrade Internal Relationship Manager role to Senior Relationship Manager.</b> This role will manage the team of Sales and Support Officers and be responsible for training.
4	April 2014	<b>Approach the identified contractors to be retained</b> and offer them a job with DHA as a Relationship Manager <b>Notify remaining contractors that their contracts will not be renewed</b>
5	April 2014	<b>Sales and Support Officers commence</b> Training begins
6	May 2014	<b>Recruit to fill Relationship Manager positions</b> not accepted by current contractors
7	30 June 2014	Remaining contracts lapse

# Memorandum



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AUSTRALIA

## The Program

The timing of this implementation will ensure disruption to the SLB program and the achievement of the 2013/13 SLB is minimal – the program is ahead of target and market conditions are relatively strong.

The primary levers in driving sales in weaker market conditions have proven to be pricing and a strong product marketing program. These, in concert with well-trained Relationship Managers, will ensure a robust sales program across the property cycle.

## Clients

## Staff

s47E (c)

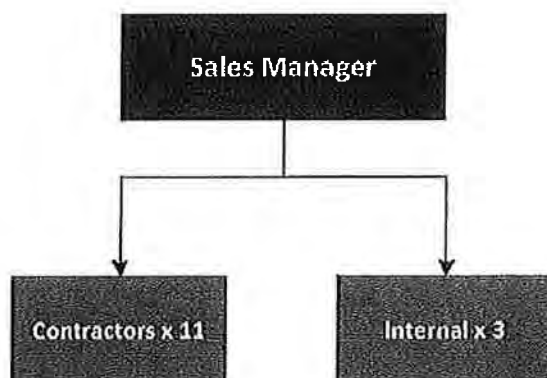
## Lead Management

The new Sales Officer role will be the first contact with the client. They will “qualify” all new leads. All prospects and “hot” leads will be allocated to a Relationship Manager with the balance of leads managed by the Sales & Support officers.

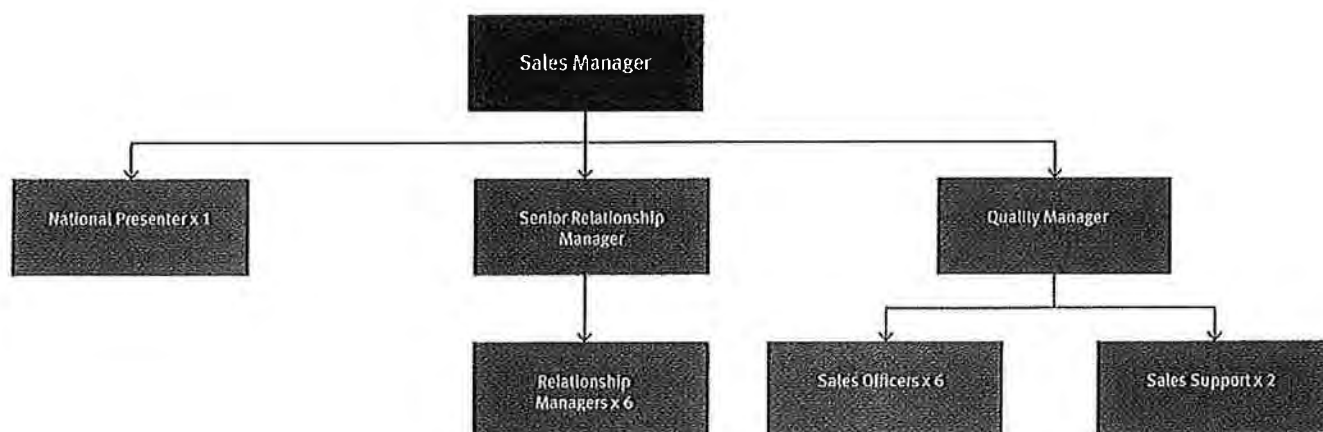
# Memorandum

## Attachment 1 Current v Proposed Sales Team Structures

### Current Structure



### Proposed Structure



# Memorandum



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**AUSTRALIA**

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# Memorandum

## Attachment 3 SLB Sales Team Proposed Costs

Title	Lvl	Salary/Comm	Other Costs	Standard Bonus	Total
National Sales Manager	EL1	120,000	36,000	15,000	171,000
Snr Relationship Mgr	EL1	105,000	31,500	13,125	149,625
Quality Manager	EL1	100,000	30,000	12,500	142,500
Relationship Mgr 1	6	90,000	27,000	11,250	128,250
Relationship Mgr 2	6	90,000	27,000	11,250	128,250
Relationship Mgr 3	6	90,000	27,000	11,250	128,250
Relationship Mgr 4	6	90,000	27,000	11,250	128,250
Relationship Mgr 5	6	90,000	27,000	11,250	128,250
Relationship Mgr 6	6	90,000	27,000	11,250	128,250
Sales Officer - RM 1	4/5	70,000	21,000	5,250	96,250
Sales Officer - RM 2	4/5	70,000	21,000	5,250	96,250
Sales Officer - RM 3	4/5	65,000	19,500	4,875	89,375
Sales Officer - RM 4	4/5	65,000	19,500	4,875	89,375
Sales Officer - RM 5	4/5	65,000	19,500	4,875	89,375
Sales Officer - RM 6	4/5	65,000	19,500	4,875	89,375
Support Officer	3/4	50,000	15,000	3,750	68,750
Support Officer	3/4	50,000	15,000	3,750	68,750
<b>Sub Total</b>		<b>1,365,000</b>	<b>409,500</b>	<b>145,625</b>	<b>1,920,125</b>
Presenter	6	90,000	27,000	6,750	123,750
<b>Total</b>		<b>1,455,000</b>	<b>436,500</b>	<b>152,375</b>	<b>2,043,875</b>

# Memorandum

## Attachment 4 SLB Sales Team Proposed Roles

Title	Region	Lvl	No.	Description
Sales Support	Pref CBR	DHA3/4	2	<ul style="list-style-type: none"> <li>*Manage Cold Database (roughly 75,000 clients)</li> <li>*Manage National Sales Phone Queue</li> <li>*Funnel rejuvenated cold leads to Relationship Managers</li> </ul>
Sales Officer	Flexible	DHA4/5	6	<ul style="list-style-type: none"> <li>*Qualify all new leads (Unqualified)</li> <li>*Progress warm and hot through to Relationship Manager</li> <li>*First point of contact for all new leads</li> <li>*Outbound Call 1500-2000 new leads per month</li> <li>*Work in tandem with specific Relationship Manager</li> </ul>
Relationship Mgr	Flexible	DHA6	6	<ul style="list-style-type: none"> <li>*Most important role in Sales Team</li> <li>*Convert hot &amp; prospect into settlements</li> <li>*Develop &amp; Maintain Relationships with all active clients</li> <li>*Manage roughly 1800 Clients (1700 prospects &amp; 100 Hot)</li> </ul>
Quality Mgr	CBR	EL1	1	<ul style="list-style-type: none"> <li>*Sell roughly 125 properties per year</li> <li>*Based anywhere in Australia, preferably scattered</li> <li>*"Client first" culture</li> <li>*Manage all Sales &amp; Support Officers</li> <li>*Implement Training program for Sales &amp; Support Officers</li> <li>*Works with Senior Relationship Mgr to ensure speed and efficiency</li> <li>*Improve quality of lead through funnel</li> <li>*Ensure data integrity</li> </ul>
Snr Relationship Mgr	CBR	EL1	1	<ul style="list-style-type: none"> <li>*Manage all Relationship Managers</li> <li>*Implement Training program for Relationship Managers</li> <li>*Manage escalated client expectations (ballot)</li> <li>*Decrease off-hold and withdrawal rates</li> <li>*Decrease lead to settlement period</li> </ul>
National Presenter	CBR/SYD	EL1	1	<ul style="list-style-type: none"> <li>*Present National Seminar program</li> <li>*Enhance content and Improve delivery</li> <li>*Source and investigate venues</li> <li>*Specific Client Targeting</li> <li>*Lift attendance and conversion rates</li> </ul>

Madeline Dermatossian  
**Chief Operating Officer**

**Approved / Not approved**

Jon Brocklehurst  
**Chief Financial Officer**

**Netting, Jason**

---

**From:** Netting, Jason  
**Sent:** Monday, 18 November 2013 8:41 AM  
**To:** Carton, Daniel  
**Subject:** Sheets for proposal

Hi Dan,

Attached are the sheets for the proposal.

s47F I would rather keep the in, I think it is important considering

I don't think it should be a big issue, considering the overall benefits.

s47F

Kind Regards,

**Jason Netting** | National Sales Manager  
Sales, Marketing and Portfolio Management Division | Defence Housing Australia  
26 Brisbane Avenue Barton ACT 2600  
Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mobile: s47F  
[jason.netting@dha.gov.au](mailto:jason.netting@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)



Title	Lvl	Salary/Comm	Other Costs	Standard Bonus	Total
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s47E(c)

Sub Total		\$1,210,000.00	\$363,000.00	\$146,250.00	\$1,719,250.00
Presenter	6	\$90,000.00	\$27,000.00	\$11,250.00	\$128,250.00
Grand Total		\$1,300,000.00	\$390,000.00	\$157,500.00	\$1,847,500.00



s47F

Sub Total		\$2,288,429.00	\$64,500.00	\$20,375.00	\$2,373,304.00
Grand Total		\$2,288,429.00	\$64,500.00	\$20,375.00	\$2,373,304.00

s47F

	Current		Proposed	
		Cost		Cost
External		\$2,073,429.00		\$0.00
Internal		\$299,875.00		\$1,847,500.00
Total		\$2,373,304.00		\$1,847,500.00
Saving Per Head				\$47,800.36
Total Saving				\$525,804.00

## Netting, Jason

---

**From:** Carton, Daniel  
**Sent:** Wednesday, 18 December 2013 3:52 PM  
**To:** Bechelli, Elvio  
**Cc:** Netting, Jason  
**Subject:** RE: Sales Team

Elvio,

Further to the below, I am still compiling some informal benchmarking from a sample of the re agents on our panel around what they pay their "middle of the bell curve" agents... I got some initial stuff back but not happy with it so I need to go back to the respondents.

Cheers  
 Dan

---

**From:** Carton, Daniel  
**Sent:** Wednesday, 18 December 2013 2:16 PM  
**To:** 'Bechelli, Elvio'  
**Cc:** 'Netting, Jason'  
**Subject:** RE: Sales Team

Elvio,

See below – happy to discuss.

Cheers  
 Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

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**From:** Bechelli, Elvio  
**Sent:** Wednesday, 18 December 2013 8:13 AM  
**To:** Carton, Daniel  
**Subject:** Sales Team

Dan,

Could you please provide details for each consultant:

1. Commission earned year to date to 30 Nov 2013
2. Settlements year to date to 30 Nov 2013
3. Forecast commission full year to 30 June 2014
4. Forecast settlements full year to 30 June 2014

Do you have any information on commission structure of real estate agents as a benchmark ie they normally charge between 1.3% to 2% (confirm) but how much commission would they pay their sales team.

Rgds  
Elvio

**Netting, Jason**

---

**From:** Bechelli, Elvio  
**Sent:** Thursday, 12 June 2014 9:06 AM  
**To:** Carton, Daniel  
**Cc:** Netting, Jason  
**Subject:** RE: Sales Team planning

That's fine

---

**From:** Carton, Daniel  
**Sent:** Thursday, 12 June 2014 8:40 AM  
**To:** Bechelli, Elvio  
**Cc:** Netting, Jason  
**Subject:** RE: Sales Team planning

Elvio,

As would be replacing a lost internal we will be restoring the current status quo balance.  
 We are notionally at 4 now ( ) with the below proposing to restore us to 4 ( )

Jason will call you to explain a bit better.

Cheers  
 Dan

---

**From:** Bechelli, Elvio  
**Sent:** Thursday, 12 June 2014 8:18 AM  
**To:** Carton, Daniel  
**Subject:** Re: Sales Team planning

Dan

I would bring on as we do not want to change balance too much yet given s47F

Where is working from

s47F

rgds  
 Elvio  
 Sent from my iPad

On 12 Jun 2014, at 7:37 am, "Carton, Daniel" <[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au)> wrote:

Elvio,

The Grand Plan in response to the loss of the two internal sales staff:

position (APS 6) – Jason working on

s47F

position (APS 4) – upgrade to same conditions as role and role s47F  
– suggest to  
t  
Additional external sales agent –

To pull this off would be an incredible achievement and create a very powerful experienced and multi-talented internal sales team.

Jason is also speaking with a local recruitment firm to see who is out there that may suit the internal role.

Let me know your thoughts

Cheers  
Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**  
26 Brisbane Avenue Barton ACT 2600  
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[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

## Netting, Jason

---

**From:** Carton, Daniel  
**Sent:** Thursday, 14 November 2013 9:30 AM  
**To:** Netting, Jason  
**Subject:** Sales Team Restructure

See below...

**Dan Carton** | National Manager, Portfolio Operations & Partnerships  
 Sales, Marketing and Portfolio Management | Defence Housing Australia  
 26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6039 | Fax: 02 6222 2269 | Mob: s47F  
[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

### Purpose

To seek approval to proceed with a restructure of the SLB Sales team.

### Background

DHA has an SLB sales team consisting of 11 external sales contractors and 3 internal staff.

s47E (c)

### Restructure

INSERT TABLE w Current v Proposed

### Cost Savings

With the changes above, we believe the saving per Sales person is around \$XXX with an estimated overall saving of \$XXX.

The aim of the proposed change is make the process client focused, not distracted by the focus on the back-pocket of the consultant.

The current remuneration structure is potentially so lucrative that the pursuit of the commission distracts from customer service and conducting business transparently.

### Existing Contractors

**New Sales Team members**

With the changes occurring across the business, we believe that these positions could be filled by surplus DHA staff. Many of the surplus staff will be staff with a strong record of customer service. This provides the ideal pool of people to fill these roles.  
Specific sales training will be provided to staff.

**Roll-out**

- Stage 1 - Recruit targeted external contractors as staff
- Stage 2 - Terminate contracts of identified poor-performing consultants
- Stage 3 - Recruit internally to fill positions
- Stage 4 - Remaining sales contractors contracts lapse at 30 June

This will ensure disruption to the sales program is minimized.  
It is seen at the optimal time to make this restructure while the program is ahead of target and market conditions in some locations (particularly Sydney) are strong.



## Netting, Jason

---

**From:** Carton, Daniel  
**Sent:** Monday, 17 February 2014 4:57 PM  
**To:** Netting, Jason  
**Subject:** RE: Changes in Sales Structure

Well then we have to fight for 3  
 Ask for 5?

---

**From:** Netting, Jason  
**Sent:** Monday, 17 February 2014 4:56 PM  
**To:** Carton, Daniel  
**Subject:** RE: Changes in Sales Structure

If its only 2 is one of them s47F

**Jason Netting** | National Sales Manager  
 Sales & Portfolio Management | Defence Housing Australia  
 26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mobile: s47F  
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---

**From:** Carton, Daniel  
**Sent:** Monday, 17 February 2014 4:55 PM  
**To:** Netting, Jason  
**Subject:** RE: Changes in Sales Structure

Obviously following my discussion w Elvio this afternoon the below could be permanently or temporarily on the back burner...

Do we realistically set our goals at an initial cull of the non-performers and an in principal agreement to reduce and replace?

I think we should chase an additional 2 internal offset by a reduction in s47F

---

**From:** Netting, Jason  
**Sent:** Monday, 17 February 2014 12:45 PM  
**To:** Carton, Daniel  
**Subject:** Changes in Sales Structure

Dot points more than anything

Hi Everyone,

As you are aware we have recently conducted a review of the Sale & Leaseback program.

Out of this review a new Sales team structure will commence as at 01 July 2014.

The current number of external consultants will be reduced from ten to five or six

There are lots of reasons behind this move to a new structure, mostly to ensure DHA's flexibility.

Also out of this there will be major changes to any new contracts and the subsequent commission structure.

The new contract will have a reduced retainer and each settlement will have a set dollar figure not a % of the sale price.

s47E

If anyone would like to entertain terminating their contract prior to 30<sup>th</sup> June can you please contact me personally so we can see if DHA can offer you anything.

As you are all aware any contract lapsing or terminated does not have settlements paid out beyond that date.

For any further information, could you please call me so we could specifically talk about you and not in general terms.

Kind Regards,

**Jason Netting** | National Sales Manager  
Sales & Portfolio Management | Defence Housing Australia  
26 Brisbane Avenue Barton ACT 2600  
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[jason.netting@dha.gov.au](mailto:jason.netting@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

**Netting, Jason**

---

**From:** Carton, Daniel  
**Sent:** Friday, 21 March 2014 3:55 PM  
**To:** Bechelli, Elvio; Netting, Jason  
**Cc:** Law, Emma  
**Subject:** RE: Sales Team Update

Elvio, s47F

Re: the : consultants that have been identified for non-contract renewal... I will organise for the consultant assessment that was done in January (with descriptions for each assessment category) to be sent through to you.

I will also put the budget position together Monday re: capacity to afford : starting in May.

Thanks s47f  
 Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

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[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

---

**From:** Bechelli, Elvio  
**Sent:** Friday, 21 March 2014 2:56 PM  
**To:** Netting, Jason  
**Cc:** Carton, Daniel  
**Subject:** RE: Sales Team Update

Thanks Jason.

I will need to discuss this with Madeline. To do so I need reasons why we are not renewing these contracts.

In regard to sales staff coming on board I need confirmation that their costs will be within budget.

Rgds  
 Elvio

---

**From:** Netting, Jason  
**Sent:** Friday, 21 March 2014 1:36 PM  
**To:** Bechelli, Elvio  
**Cc:** Carton, Daniel  
**Subject:** Sales Team Update

Hi Elvio,

Thank you our discussions yesterday and the clarity you have provider us with.

It is now our understanding that DHA do not wish to quickly change the current sales model. Any material changes to the sales model would be contingent on the demonstrated sales success of the internal sales team.

s47E(c)

This would not be an added cost, rather a bring forward of payments that would have been paid over the next 3 months.

Kind Regards,

**Jason Netting** | National Sales Manager  
Sales & Portfolio Management | Defence Housing Australia  
26 Brisbane Avenue Barton ACT 2600  
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[jason.netting@dha.gov.au](mailto:jason.netting@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

**Netting, Jason**

---

**From:** Carton, Daniel  
**Sent:** Tuesday, 15 April 2014 10:37 AM  
**To:** Sales and Portfolio Management  
**Subject:** 13/14 SLB Target Progress

Hi,

A quick note to let you all know that we have enough sales orders now to deliver the 2013/14 revenue target of \$380m. This is very impressive as we are not only on track to achieve a record level of revenue but we are now on schedule to coast home.

Thanks to you all for your contribution and hard work. All these achievements are as a result of you and your cumulative efforts every day and every week.

No rest though ☺... the target grows again in 2014/15 to over \$420m!

We will request that sales advices are submitted with July settlement dates shortly... but not yet... keen to build a buffer to accommodate any off-holds and withdrawals.

Regards

Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

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[daniel.carton@dha.gov.au](mailto:daniel.carton@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

s47F

## Netting, Jason

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**From:** Carton, Daniel  
**Sent:** Tuesday, 1 July 2014 10:55 AM  
**To:** Sales and Portfolio Management; Sales Consultants  
**Cc:** Bechelli, Elvio  
**Subject:** 13/14 Results!

Hi,

I am pleased to announce that for 13/14 Sales & Portfolio Management met all the SLB and Disposals Targets – revenue and margin. In fact, we did so very comfortably in the end.

Congratulations on a great year! Sincerest thanks for all your hard work on a daily basis.

2013/14 has been a momentous year for the team:

- First DHA Managed Fund
- Change Executive Management with the arrival of new COO Madeline Dermatossian and new GM Elvio Bechelli
- The SLB Review – more come on this at the workshop
- Expanded team with the addition of the Sales Team
- Trevor & Carla's great ongoing and rapidly growing work in the Sales Development & Partnerships space
- Introduction of a mid-lease referral service
- Establishment of new legal panels
- Establishment of new Disposals and Mid-Lease Sales panel

Another year begins, a bigger target, new initiatives, new staff... much fun awaits!

Keep up the great work!

Cheers

Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6039 | Fax: 02 6222 2269 | Mob:  
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: s47F

**Netting, Jason**

---

**From:** Netting, Jason  
**Sent:** Monday, 17 March 2014 3:42 PM  
**To:** Sales Consultants  
**Subject:** Lessors moved to myself

Hi Everyone,

Just so you are now aware, these below lessors are now allocated to me (sorry you were hit hardest)

These are lessors who own 6 or more properties who are now going to be managed internally.

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There will be more to follow once all of the data is combined correctly.

If you have any questions, just give me a call.

**Jason Netting** | National Sales Manager  
Sales & Portfolio Management | Defence Housing Australia  
26 Brisbane Avenue Barton ACT 2600  
Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mobile:  
[jason.netting@dha.gov.au](mailto:jason.netting@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

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## Netting, Jason

---

**From:** Netting, Jason  
**Sent:** Friday, 6 September 2013 10:26 AM  
**To:** Sales Consultants Only  
**Subject:** Qualifying of Leads

**Importance:** High

Good Morning All,

With changes to the website happening in the near future, I would just like to remind you about the qualifying of Leads.

Contact is to be made within 48 hours, if a phone number is present, then that client is to be called. No exceptions.

I will be taking the stance that if it isn't in Runway – it didn't happen.

I don't want anyone to be moved off unqualified if actual contact has not been made. They can only be moved off unqualified if;

1. Call answered with notes added corresponding to that call (at this point preferences should be added)
2. Call returned with notes added corresponding to that call (at this point preferences should be added)
3. Email returned with notes corresponding to that email (this does not include a "response")

The failing of this will result in leads being taken off the offending consultant and given to a consultant who will action them.

It has taken a lot of effort in the background to ensure we could get more phone numbers, now we need to prove its worth.

Please note, this refers to internal sales consultants as well as external sales consultants.

If anyone has any questions, more than happy to have a chat.

Kind Regards,

**Jason Netting** | National Sales Manager  
 Sales, Marketing and Portfolio Management | Defence Housing Australia

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**Netting, Jason**

---

**From:** Carton, Daniel  
**Sent:** Monday, 17 February 2014 4:52 PM  
**To:** Netting, Jason  
**Subject:** RE: MailChimp Mark II

Thanks

As discussed, please allocate clients with a 1,2 and 3 score to frozen and lets work on a customised campaign for them designed to illicit a response... maybe 3 monthly

What will the strategy be for the remaining colds?

Cheers  
Dan

---

**From:** Netting, Jason  
**Sent:** Monday, 17 February 2014 2:32 PM  
**To:** Carton, Daniel  
**Subject:** MailChimp Mark II

Hi Dan,

We have this too, its only new

Kind Regards,

**Jason Netting** | National Sales Manager  
Sales & Portfolio Management | Defence Housing Australia  
26 Brisbane Avenue Barton ACT 2600  
Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mobile:  
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<< File: Campaign Stats 17-02-2014.xls >>

**Netting, Jason**

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**From:** Netting, Jason  
**Sent:** Thursday, 5 December 2013 3:43 PM  
**To:**  
**Cc:**  
**Subject:** Removal of Colds  
**Importance:** High

Good Afternoon Everyone,

To allow you to spend more time on unqualified/warm/hot/prospect clients, effective immediately all "colds" will now be managed internally.  
This change has come about as we recognise the time constraints you are all under in managing such large databases.

This means that external consultants and Sarah will no longer at any point have "colds" in their allotted DHA database:

- If an unqualified has not provided email proof of preferences after a reasonable time frame (no longer than 2 weeks) they must be moved from unqualified to "cold" and re-allocated to internal sales.
- If by way of internal communication a "cold" who progresses through the funnel to "warm" or "hot" (has provided preferences and or financial pre-approval), they will automatically be returned to the consultant they originated with.
- "Warm" clients who have not met the "warm" criteria with preferences on file by the 19<sup>th</sup> December will be automatically moved to "cold" and re-allocated to internal sales.

If for any specific reason you need a client re-allocated back to you, please contact me directly.

Kind Regards,

**Jason Netting** | National Sales Manager  
Sales & Portfolio Management | Defence Housing Australia  
26 Brisbane Avenue Barton ACT 2600  
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[jason.netting@dha.gov.au](mailto:jason.netting@dha.gov.au) | [www.dha.gov.au](http://www.dha.gov.au)

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## Netting, Jason

---

**From:** Netting, Jason  
**Sent:** Wednesday, 5 February 2014 12:14 PM  
**To:** Bechelli, Elvio  
**Cc:** Carton, Daniel  
**Subject:** Change to National Lead Allocation Model

Hi Elvio,

Below is a quick outline of analysis in respect to the change in the allocation model.  
 Considerations were taken on board in respect to how this would impact the business prior to implementation.

### Strengths

- Will give DHA the ability to performance measure consultants based on even playing field of leads.
- Will give DHA the ability to Workforce and Ability plan based on the results over a specific time frame.
- Promotes a great culture within the internal team in respect to acceptance as well confidence in their own ability.
- Will become cost effect for DHA as internal consultants start to pick up properties.
- 11 consultants out of the 13 are extremely happy with the new model, this will promote positive all round culture.

### Weakness

- A possible small percentage of clients will only want to deal with clients in their own state. (We have yet to service a complaint in respect to this)
- Increases work load of internal team.

### Opportunity

- Each individual consultant will get greater exposure to dealing with clients outside of their own state.
- Gives consultants based in underperforming lead generation states to shine under the new model.
- Gives consultants based in better performing lead generation states to prove that are still good no matter the lead allocation model.
- Up skills the internal team.

### Threat

- Two consultants out of 13 are marginally unhappy with the new model (these are the agents that currently receive leads from the premium states), they may not portray this in a positive light.
- Possible further discontent from an external consultant point of view as internals start to pick up more properties.

### General Comments

- The existing model has already proven that the new National Lead Allocation model will work, as

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Not once has a client raised concerns about the consultants locality they are dealing with.

- Any client wishing to deal with someone local will automatically be transferred to that local consultant even under the new model.

Kind Regards,

**Jason Netting** | National Sales Manager  
 Sales & Portfolio Management | Defence Housing Australia  
 26 Brisbane Avenue Barton ACT 2600  
 Tel: 02 6270 6072 | Fax: 02 6222 2269 | Mobile:

s47F



DHA Sales and Marketing / Sales, Marketing and Portfolio Management  
/ Product Marketing

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## SLB Lead Management Policy

(B) Added by Dalay, Alex last edited by Nelling, Jason on Jun 30, 2014 09:56

### Overview

The policy relating to the management of Defence Housing Australia's (DHA's) database of leads (contacts) who have registered interest in the Sale and Leaseback (SLB) program.

The policy has been developed to:

- implement a sales funnel approach to lead management,
- Implement consistent qualification of leads (contacts),
- improve customer service,
- eliminate wasted energy in the sales cycle, and
- reinforce selling behaviours and activities that move sales forward,

The policy applies to contracted sales consultants and staff employed by DHA to directly manage leads (contacts) and/or those involved in the marketing and operational management of the SLB program.

### Lead Management (SOP)

The Lead Management SOP describes the process involved managing a lead using DHA's Customer Relationship Management system (CRM) – Runway.

[Click here](#) to view the Lead Management SOP.

### Related Documents

[Click here](#) to view the Product Policy and Information and SLB Operation Policy and SOPs.

DHA SLB properties are sold with a lease agreement in place. You should be familiar with the following:

- *DHA Lease Agreement – Lease Terms with DHA Property Care – Edition 6B-- Marketing Version* (version supplied when negotiating SLB leases), and
- *DHA Lease Agreement – Lease Terms with DHA Property Care – Edition 6B – Legal Version* (DHA solicitor use only for SLB leases).

Note: Only the Marketing Version can be released publicly upon request, [click here](#) to download. The Legal Version is strictly commercial-in-confidence should you wish to familiarise yourself with them.

### Allocation of DHA Contacts

#### Funnel Management

DHA applies a funnel approach to the management of leads; that is, contacts are grouped based on similarities in behaviour and their stage in the sales cycle.

Allocation of contacts takes into consideration factors including, but not limited to:

- how they were sourced/generated,
- the status applied following qualification, and
- the type applied following qualification.

Allocation is determined by the National Sales Manager, with a view to maximise energy of the sales team to the "pointy" end of the funnel; that is, contacts who have indicated interest to purchase within a 12 month time frame and are managed by sales consultants and internal sales. The remaining group of contacts is managed by the internal sales and marketing teams.

#### New Contacts

New contacts are allocated for initial qualification based on a National round robin basis (refer to Table 1). The National Sales Manager determines the allocation of new contacts.

#### Example

No matter where a contact is located, they will be allocated to the sales team member who is next in line via the round robin model. Once the round robin has run full cycle, this process will be repeated continually as leads are registered.

Exceptions to contact allocation, but are not limited to:

- self generated leads,
- referral from existing contacts,
- request by contacts to be allocated to a specific sales consultant, and
- National Sales Manager determination to allocate contacts to a specific consultant or internal sales.

#### DHA Lessors

Wherever possible, DHA lessors are allocated to the sales consultant/internal sales that facilitated their purchase. Exceptions to this include, but are not limited to:

- where a change of sales consultant is requested by the lessor
- If the sales consultant is no longer contracted by DHA, and/or
- reallocation at the discretion of the National Sales Manager

No time limit is applied to this ruling; however personal contact must be demonstrated at regular intervals through notes in Runway.

Lessor will lose this status even after their lease with DHA has ended or they sell the property. If you need to check the status of a Lessor, contact a member of the Internal Sales Team. The Internal Sales Team will be able to confirm if a Lessor has a current lease to ensure that they can maintain Lessor status.

Current Lessors do not require financial pre approval to be included within the ballot.

There are three types of existing lessors - Lessor, VIP Lessor & Platinum Lessor.

Lessor = Would own 1-2 DHA properties - VIP Lessor = Would own 3-5 DHA properties, Platinum Lessor = Would own 6+ DHA properties

Where a sales consultant's contract with DHA is terminated, lessors allocated to them will be reallocated under the discretion of the National Sales Manager. This could include but is not limited to sales consultants and internal sales.

#### Self Generated Leads

These are defined as contacts that have been generated purely by the individual actions of the sales consultant or staff member, not marketing activity paid for by DHA or referral from a contact, supplier or other third party.

#### Adding a New Contact Record

All potential Investors who enquire about DHA's SLB program must have their details added as a contact record in Runway. Allocation and qualification cannot occur until a basic contact record has been created.

When a person contacts DHA for the first time via the Invest website, a contact record is automatically created. They will be allocated based on the round robin model and the Status of Unqualified will automatically be applied.

If a person contacts DHA by any other means, a contact record needs to be manually created; this is a member of the internal sales team through the inbound call centre role in Runway. The Status will default to Unqualified when a new contact record is created.

Note: data you search for is populated in Runway exactly as entered; there is currently no auto formatting. Please ensure data is entered or corrected to be in Title Case wherever possible. Caps may be used for City/Suburb information.

Runway requires *mandatory* information that must be sourced from the contact to establish a valid record.

##### a. Contact Information (in Primary Details)

##### b. Source details (above Combined Profile)

This information is used by the marketing team to measure the effectiveness of media and other channels. Accurate data entry will assist to ensure marketing spend generates the best quality leads which reflect how the contact heard about DHA's property investment program.

Note: Currently Runway functionality does not exist to distinguish types of communication (e.g. property alerts versus *Investor Insights*). When information is distributed via email, it is typically sent to all contacts with a valid email address, so an 'all or nothing' approach must be applied.

#### Qualification of DHA Contacts

DHA has adopted a funnel approach to leads management, whereby contacts are grouped based on similarities in behaviour and their stage in the sales cycle. This is achieved through the application of a Status and Type to each contact upon qualification.

The lead is then allocated to a sales consultant or internal sales following the round robin model or Product Marketing Admin to ensure efficiency in the sales cycle. The allocation of leads is always at the discretion of the National Sales Manager.

#### Qualifying by Status

A description of each possible Status that can be applied to a DHA contact is outlined below. A note will automatically be added in Runway when a contact's Status is changed.

##### Event Registration: Allocation Sales Consultant (presenter)

- Contact registered to attend a DHA hosted event
- Allocated to presenting sales consultant unless an existing contact record exists
- Receive event confirmation upon registering (system generated)
- Receive email communication from product marketing if opted in
- Receive collateral at DHA hosted event
- Lead to progress through funnel through re-qualification post event
- Reporting established to monitor re-qualification within two weeks.

##### Unqualified: Allocation Internal Sales/Sales Consultant

- New contact generated from marketing activity (i.e. website/inbound call)
- Allocated to sales consultant/internal sales
- Receive acknowledgement of registration or welcome email upon registering
- Contact must be made within 48 hours to qualify;
- If a phone number is provided, that client must be called within 24 hours
- To be moved to cold and re-allocated to internal sales if no preferences have been received after 2 weeks
- May only be moved to warm if preferences have been noted
- May only be moved to hot if preferences, finance pre-approval and address has been noted
- May receive information pack post qualification

**Unqualified: Allocation Internal Sales/Sales Consultant**

- Contact to progress through funnel following re-qualification
- Reporting established to monitor re-qualification (weekly basis)
- Contacts that remain unqualified for more than 2 days will be re allocated at the discretion on the National Sales Manager.

**Lessor: Allocation: Internal Sales (Type = Lessor)  
Sales Consultant (Type = Lessor)**

- Contact is a Lessor
- Purchasing time frame may be unknown
- Allocated to Internal sales or sales consultant
- Receive email communication from internal sales and sales consultants
- Lead likely to progress through funnel as a result of own action
- Sales consultant to personally contact every 6 months.

**Cold: Allocation: Internal Sales or PM Admin (Type = Lead or SG Lead)**

- Contact is not intending to buy in 12 months
- Allocated to Internal sales or Product Marketing Admin
- Upon further qualification, cold leads will be allocated back to a sales consultant (note: they will need to be at a status of warm and continue to meet the criteria for a warm lead). Unless qualification has been progressing via internal sales.
- Receive email campaigns from Product Marketing if opted in
- Receive email communication from internal sales
- Contact to progress through funnel as a result of internal sales or own action

**Warm: Allocation: Internal Sales/Sales Consultant**

- Contact is intending to buy within 12 months
- Must have preferences noted
- May have finance pre-approval on file
- Allocated to sales consultant or Internal sales
- Emphasis on sales consultant/internal sales interaction (i.e. calls, seminars, F2F meetings) to match demand with future supply
- Receive email campaigns from product marketing if opted in
- Receive email communication or regular contact from sales consultant/internal sales
- Contact to progress through funnel as a result of sales consultant/internal sales interaction or own action
- Reporting established to manage re-qualification.
- A minimum personal contact requirement; at least one personal contact required every two months, including one phone call every 6 months.
- All required runway fields need to be completed.

**Hot: Allocation: Internal Sales/Sales Consultant**

- Contact is intending to buy within 3 months
- Must have finance pre-approval on file
- Allocated to sales consultant or Internal sales
- Emphasis on sales consultant/internal sales interaction (i.e. calls and emails) to match demand with supply
- Receive email campaigns from product marketing if opted in
- Receive email communication or regular contact from sales consultant/internal sales
- Contact to progress through funnel when demand and supply are matched
- Reporting established to manage re-qualification (monthly basis).
- A minimum personal contact requirement, at least 1 personal contact required every 2 weeks including 1 phone call every month.
- All required runway fields need to be completed

Finance pre-approval must be recorded in Runway in a specific manner to assist with reporting. This is used to determine eligible bids as part of the weekly bidding system, so it is vital that information is captured correctly.

**Bidding: Allocation: Internal Sales/Sales Consultant**

- Contact Instructed Sales Rep to attempt to place a property (or properties) on hold
- Finance pre-approval is on file
- Allocated to sales consultant or Internal sales
- Emphasis on sales consultant/internal sales interaction (i.e. calls and emails) to match demand with supply
- Contact to progress through funnel when property is secured
- Contact to immediately progress back through the funnel if property is not secured (i.e. re-qualified with a Status of Hot or Warm)
- Reporting established to manage re-qualification (weekly basis).
- Please note - Bids submitted at anytime on bidding clients will be removed if incomplete

All contacts who instruct you to place a property 'on hold' for them (i.e. either process outlined above) should have a Status of Bidding and should be nominated in the weekly bid process. This is needed for reporting purposes. **This functionality is automatic when Property Bids and a property is selected.** Contacts that are successful in securing a property are then re-qualified to have a Status of Purchasing. All other contacts should then be requalified (i.e. to a Status of Hot if wishing to buy within 3 months or Warm if not looking to buy for 3 to 12 months).

**Opt Out: Allocation PM Admin (unless a Lessor or SG Lead)**

- Contact has requested to Opt Out of communication from DHA
- Contact is non-responsive (time limit to be set)
- Reporting established to manage archiving (time limit to be set)

**Opt Out: Allocation PM Admin (unless a Lessor or SG Lead)**

- If Type of Lessor, VIP Lessor or Platinum Lessor contact record is always maintained
- If Type other than Lessor, VIP Lessor or Platinum Lessor the contact record may be archived (time limit to be set).

**Qualifying by Type**

A description of each possible Type that can be applied to a DHA contact is outlined below. A note will automatically be added in Runway when a contact's Type is changed.

**Lead: Allocation Internal Sales/Sales Consultant or PM Admin**

- Contact registered interest in the SLB program as a result of DHA marketing activity
- There is no evidence to suggest that the contact has bought a property from DHA (i.e. is not a DHA lessor)
- The contact is not a Supplier.

**Lessor: Allocation Internal Sales/Sales Consultant or PM Admin**

- Contact registered interest in the SLB program as a result of DHA marketing activity
- Evidence supports that the contact has bought and currently still owns 1-2 properties from DHA (i.e. is a DHA lessor)
- The contact is not a Supplier.

**VIP Lessor: Allocation Internal Sales/Sales Consultant or PM Admin**

- Contact registered interest in the SLB program as a result of DHA marketing activity
- Evidence supports that the contact has bought and currently still owns 3-5 properties from DHA (i.e. is a DHA lessor)
- The contact is not a Supplier.

**Platinum Lessor: Allocation National Sales Manager**

- Contact registered interest in the SLB program as a result of DHA marketing activity
- Evidence supports that the contact has bought and currently still owns 6 or more properties from DHA (i.e. is a DHA lessor)
- The contact is not a Supplier.

**SG Lead: Allocation Internal Sales/Sales Consultant**

- Contact registered interest in the SLB program via a sales consultant or internal sales (i.e. not through paid marketing activity)
- There is no evidence to support that the contact leases or has leased a property to DHA (i.e. is not a DHA lessor)
- The contact is not a Supplier.

**RE Agent: Allocation Internal Sales/Sales Consultant**

- Contact registered interest in the SLB program or is known to the sales consultant or internal sales
- Contact is a real estate agent
- Contact has a Status of Supplier.

**Finance: Allocation Internal Sales/Sales Consultant**

- Contact registered interest in the SLB program or is known to the sales consultant or internal sales
- Contact is a mortgage broker or works for a financial institution
- Contact has a Status of Supplier.

**Legal: Allocation Sales Consultant/Internal Sales**

- Contact registered interest in the SLB program or is known to the sales consultant or internal sales
- Contact is a conveyancer or solicitor
- Contact has a Status of Supplier.

**Valuer: Allocation Internal Sales/Sales Consultant**

- Contact registered interest in the SLB program or is known to the sales consultant or internal sales officer
- Contact is a property valuer
- Contact has a Status of Supplier.

**Recording Interactions with DHA Contacts**

**Recording a Note**

Notes store the entire communications history with a contact. Every time you communicate with a client you must record the outcome with a note. While outbound emails are recorded automatically, you must manually record a note for any other In/out bound communication.

**Note Types**

When recording a note you must select the type of communication that is being recorded in the note.

The following table defines the note types and provides additional information about how to correctly record the note.

**Note Types CONTINUED...**

Field	Description
Call	An outbound call to the contact. Use the call status field to record the outcome of the call.
Note	Used when recording a brief record, comment or explanation as an aid to the memory or for the aid of other users.

Field	Description
Mail Out	A letter or pack posted to the contact. Record the date and time the item was sent to the contact. Record a summary of the contents of the piece in the subject and body of the note.
Reminder	You can set reminders for yourself and for other Runway users. The reminders will be set for the person in the Author field. The due date for the reminder is the date and time of the note. Refer to <i>Adding a Reminder</i> for additional information.
Inbound Call	An Inbound call from a contact.
Fax	An Inbound or outbound facsimile transaction.

#### Recording Finance Pre-approval

DHA requires written finance pre-approval be provided before attempts can be made to secure a property. The only exception to this is where the contact has a **Type of Lessor, VIP Lessor or Platinum Lessor**. It is assumed that DHA lessors have the necessary means to repurchase.

Finance pre-approval must be recorded for contacts with a **Status of Hot, Bidding or Purchasing**. Finance pre-approval may be recorded for contacts with a **Status of Warm**. The only exception to this is where the contact has a **Type of Lessor, VIP Lessor or Platinum Lessor**.

#### Sending an Email

Runway includes a range of email templates that you can send to your contacts. These templates are managed by the National Sales Manager. Email the National Sales Manager if you wish for a new template to be created or changes to be made to an existing template. Where a template exists in Runway this should be utilised as it includes the required format, details and disclaimers in relation to the relevant topic.

#### Providing a Property Address

When providing a physical address to a client for a property in the pre-release, an interaction needs to be created in Runway to show that the address has been provided. Along with that email to the client that shows the address, a disclaimer must be noted. This disclaimer will spell out to the client the acceptable behaviour in respect to having this address. This would include but is not limited to knocking on the door, peering in the windows and or looking over fences. If any clarification is needed, please contact the National Sales Manager.

#### Reporting

Contact reporting can be provided by the National Sales Manager upon request. All bulk emails are sent utilizing a Mailchimp and reporting regarding the activity on campaigns is generated within Mailchimp. Regular reports on campaign activities are provided to the National Sales Manager, however, for reports on the activity of specific campaigns. If you would like a report on the activity on a particular campaign this can be requested by providing the name of the campaign and the date and time it was sent. This will provide you an overview of which leads have accessed the campaign as well as providing an overall rating based on their activity in opening campaigns ongoing.



[Like](#) Be the first to like this

No labels



## Netting, Jason

---

**From:** Netting, Jason  
**Sent:** Thursday, 19 December 2013 3:33 PM  
**To:** Carton, Daniel  
**Subject:** RE: Draft SLB Review Plan

2 & 3 Disappear when we get what we what

**Jason Netting** | National Sales Manager  
 Sales & Portfolio Management | Defence Housing Australia  
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---

**From:** Carton, Daniel  
**Sent:** Thursday, 19 December 2013 3:32 PM  
**To:** Robinson, Rachelle; Netting, Jason; Law, Emma; Molloy, Michael  
**Subject:** FW: Draft SLB Review Plan

FYI – nice!

**Dan Carton** | Head of Sales & Portfolio Management  
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**From:** Bechelli, Elvío  
**Sent:** Thursday, 19 December 2013 3:28 PM  
**To:** Carton, Daniel  
**Subject:** RE: Draft SLB Review Plan

Dan,

This is a good approach. I have following suggestions:

1. We should also interview Madeline to get any suggestions on improving the process
2. The scope of the review should include assessing the effectiveness of the sales team and options for improvement/alternate models.
3. Review bidding process and assess fairness of algorithm process. Key concern is managing people that are unsuccessful.
4. Adequacy of reporting systems for effective decision making – what critical info are we missing
5. Efficiency – what processes can we automate/streamline
6. What do we need from other teams to operate more efficiently

Review your timetable to ensure that interview/surveys can be completed within timeframe as key people may be on leave in January.

Rgds

Elvio

---

**From:** Carton, Daniel  
**Sent:** Thursday, 19 December 2013 11:06 AM  
**To:** Bechelli, Elvio  
**Subject:** Draft SLB Review Plan

Elvio,

See below... some food for thought over the Christmas break.

Happy to discuss and refine as required.

Regards  
Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

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## Draft SLB Review Plan

Proposed Project Manager – Jaime Shields (Portfolio Business Manager – currently on leave)

### THE REVIEW LOGISTICS

The review will consist of the following:

#### 1 Interviews to be conducted by Elvio and Dan with:

- Senior Sales & Portfolio Manage staff including the following
  - Emma Law
  - Michael Molloy
  - Jason Netting
  - Rachelle Robinson
- Key Senior Managers from across DHA including the following:
  - A sample of HMC Managers e.g. Bob Haylett (Townsville) and Bryan Slattery (Sydney)
  - National HMC Managers – Michael Kelly and Kelly Hunter
  - Daniel Jones & Jon Brocklehurst (Finance)
  - Brett Jorgensen (Property & Tenancy)
  - Michael Griffiths (Lessor Relations)
  - John Dietz (PPG)
  - Paulina Manenica (Leasing)
  - Rob Lafreniere (MCA)
  - Shane Nielsen & Mike Hehir (BS&T i.e. IT)
  - Natalie Cooper & Sarah Tyrrell (Marketing Communications)

#### 2 Short surveys/questionnaires to the following recipients:

- Panel solicitors
- Sales Consultants (internal and external)
- Sample of sales coordinators

### SUBJECT MATTER

Interview questions/structure and surveys/questionnaires will be customised to each interviewee & recipient based around the following topics:

- SLB Product (lease terms, management fees etc)
- Client Management
- Information Management
- Reporting
- Property Selection & Pricing
- Ballot
- Settlement Management
- Tenant Impacts
- Listing Administration

**PROPOSED TIMING**

- Interviews and surveys complete by end of January 2014
- Draft report complete by mid-February 2014
- Presented to the EPC in late February 2014.

## Netting, Jason

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**From:** Carton, Daniel  
**Sent:** Friday, 20 June 2014 1:30 PM  
**To:** Sales and Portfolio Management; Sales Consultants  
**Cc:** Bechelli, Elvio  
**Subject:** Sales Team Update

Hi,

Following on from yesterday's Sales Team announcements from Jason, I am very pleased to announce that

s47F

new role as Senior Relationship Manager will significantly strengthen the internal sales team.

With a year of massive targets ahead,

s47F

Please join me in welcoming to  
DHA.

Regards  
Dan

**Dan Carton** | Head of Sales & Portfolio Management  
**Defence Housing Australia**

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s47F