

JOB DESCRIPTION

Position Title:	Estimating Administrator
Location:	Kerikeri
Reports To:	Customer Initiated Works Co-Ordinator
Direct Reports:	Nil
Financial Responsibility:	As per delegated authority
External Relationships:	External customers Contractors Other service providers

PURPOSE

To provide administrative, client and some technical support for the Estimating Team.

OBJECTIVES

These are the overall objectives (high level) for the position – they should feed into the divisional / organisational objectives

Number	Description	Weighting
1.	Assist with creating a function that has a customer service focus by meeting and, where possible, exceeding customer requirements	50%
2.	Assist with creating admin and some technical functions that ensures maximum workflow and efficiency while not compromising customer needs	50%

DUTIES

These are the day-to-day tasks that make up the individual's role

Area	Activities
Administration and Technical	<ul style="list-style-type: none"> Check and process online forms through Salesforce, Customer Initiated Work (CIW) email, DG email and Subdivision email inboxes. <ul style="list-style-type: none"> New Network Connections (Residential, Subdivisions, Commercial) Subdivision Consent Distributed Generation Alterations to the Network / Engineering advice Get electrical work done

	<ul style="list-style-type: none"> ○ Upgrade or change my power supply • Update Salesforce / SharePoint / Spreadsheets with new information as it arrives • Process Customer Initiated Works Applications in Salesforce and Sharepoint ensuring everything is on the form, including technical information gained from experience, EO web, Prover and seeking additional information as required from the client or Team Leader • Email Client with receipt / invoice / design letters / quotes / ICPs using email templates. • Assign Salesforce CASE to appropriate person. Technical ability is required for this decision. • Process quote approvals and design letters through SAP and salesforce. • Check quotes and SAP jobs thoroughly, including some of the technical aspects (I.E. CAD plans, easements, NCCs and CAPCONs) and send to clients with plans and other documents when required, liaising with Estimators when necessary. • Check Design Letters and send to client when required and liaising with Estimators when necessary. • Process payments for new connections, upgrades, DG, design fees and quotes in SAP & SharePoint, including updating CAD plans and work pack cover sheets. Liaise with AIS and TECS. • Create ICP's via Salesforce and AXOS. Liaising with retailers, metering services and AIS as necessary. • Using ICP audit report liaise with retailers and customers as required to ensure that our audit requirements are met • Process Customer Initiated Work Permissions for CAPCONs, subdivision consents and Easements. Using Sharepoint. • Liaise with Property re AGE creation and clients re the signing of AGEs. • Liaise with Property re registering of Easements when job is complete. • Assist in the production of weekly and other reports • Ensure stationery requirements are available • Cancel quotes and design letters older than 90 days in SAP and Salesforce, if appropriate • Update processes and work instructions and Promapp as required • Train Estimators as required • General administration duties as required
Finance Support	<ul style="list-style-type: none"> • Create sales orders, invoices, purchase orders and credit notes. • Payment details and cash to Accounts Receivable. • Download and accurately match and code daily bank statements with new connections, upgrades, DG, design fees and quotes paid. Then send to Accounts Receivable. • Run aged job report from SAP and liaise with TECS and customer to close / refund jobs as appropriate. • Old salesforce jobs – liaise with TECS and customer to close / refund jobs as appropriate.

	<ul style="list-style-type: none"> Check costings in completed jobs and update in SAP and Salesforce as necessary and liaise with AIS and metering
Client Liaison	<ul style="list-style-type: none"> Face-to-face client contact. Telephone conversations with clients. Email / postal correspondence with clients. KPI – respond to client within 2 working days
Other Duties	Carry out any other duties and responsibilities as may be requested from time to time which are generally consistent with the objectives of the position

EXPECTED OUTCOMES

Monitored bi-annually through the Performance Development (PDP) Process

ADDITIONAL RESPONSIBILITIES

Asset Management	N/A
Health and Safety	Level 5 of the Responsibility Matrix
Risk Management	Level 5 of the Responsibility Matrix

QUALIFICATIONS AND EXPERIENCE

Knowledge, Skills and Abilities:

Education / Qualifications	Essential	Preferred	Experience	Essential	Preferred
NCEA level 2		X	At least 3 years' experience in a full range of office administration	X	
High level of computer ability – Excel, Word, Outlook etc	X		Previous experience in a fast-paced, challenging office environment		X
			Experience with SAP or another ERP	X	

Personal Attributes:

- Accountability
 - Holds self and others accountable for required work output and standards
 - Ensures that effective controls and contingency plans are in place
 - Projects / tasks within area of own accountability are completed on time
- Administrative Skill
 - Is highly organised
 - Is effective at keeping records and eliminating unnecessary paperwork
 - Can retrieve information quickly
 - Prepares documents with care and attention
 - Is proficient in using office equipment
 - Helps improve administrative processes
 - Prioritises tasks effectively and is good at multi tasking

- Communication
 - Expresses views in a fluent, clear, logical manner which captures interest and gains support
 - Is an effective listener
 - Shows tact and diplomacy in dealing with others
 - Effectively adapts own communication style to suit different audiences
 - Delivers information effectively in a variety of written formats

- Teamwork
 - Is committed to the team and its goals
 - Works well in a team setting
 - Develops and maintains productive working relationships within the team
 - Maintains a friendly and pleasant demeanor and is viewed by others as approachable
 - Actively involves self in team activities and contributes positively towards team spirit and morale
 - Respects confidentiality of team members

At Top Energy's discretion, this Job Description may be amended in consultation with the position holder

Manager's Signature	Position Holder's Signature
Manager's Name (please print)	Position Holder's Name (please print)
Date	Date

Responsibility Matrix

Asset Management

Level	Level Title	Job Title	Responsibility
1	Business Leader	CEO	<ul style="list-style-type: none"> • Able to direct the work of others in all roles, particularly in policy development, analysis of strategic requirements, asset management capability development, risk management and performance improvement. • Proactive in shaping the Asset Management culture and championing Asset Management principles and best practice • Must have sufficient understanding of Asset Management principles and practice to evaluate the quality of the work being done.
2	Head of Division	Divisional GM	<ul style="list-style-type: none"> • Able to direct others in asset management planning, the implementation of asset management plans, risk management and performance improvement and asset information management. • Able to guide and show others how to undertake the full range of asset management activities. • Able to undertake independently the analysis and development of asset policies and the investigation of incidents and communication of lessons learned. • Able to lead and evaluate compliance reviews and audits. • Contributes to the specification, selection and integration of asset management information systems.
3	3 rd Tier Management	Managers (Report to GM)	<ul style="list-style-type: none"> • Able to independently undertake activities in asset management planning, the implementation of asset management plans, risk management and performance improvement and asset information management. • Able to contribute to policy development, strategy development, asset management capability development, risk management and performance improvement in the area of asset management for the business
4	4 th Tier Management	Supervisor / Foreman	<ul style="list-style-type: none"> • Able to guide and show team members how to undertake implementation of asset management plans, asset management capability development, monitoring and

		(Report to a Manager)	<p>reviewing progress and performance and asset information management as it pertains to their area of the business</p> <ul style="list-style-type: none"> • Able to undertake asset management planning, asset management capability development, risk management and performance improvement as it relates to their area of the business • Contribute to asset information management as it pertains to their area of the business
5	General	All other staff	<ul style="list-style-type: none"> • Understands the contribution each role makes to the achievement of the asset management strategy and objectives • Understands the interdependencies between asset management roles • Undertake activities involved in the implementation of asset management plans and risk management and performance improvement as directed by manager as it pertains to their area of the business

Health and Safety

Level	Level Title	Job Title	Responsibility
1	Business Leader	CEO	<ul style="list-style-type: none"> • Directs the work of others in all roles in relation to Health and Safety • Sets business level goals and policies for Health and Safety and reports to Board of Directors • Deploys plans to achieve the business level goals • Proactive in shaping Health and Safety culture and champions Health and Safety principles and best practice
2	Head of Division	Divisional GM	<ul style="list-style-type: none"> • Directs the work of the division in relation to health and safety across the division • Guides and supports direct reports in all aspects of health and safety legislative and company policy adherence • Sets divisional level guidelines/ policies and objectives for Health and Safety and reports to the CEO • Deploys plans to achieve the divisional level objectives • Proactive in shaping Health and Safety culture within the division and champions Health and Safety principles and best practice
3	3 rd Tier Management	Managers (Report to GM)	<ul style="list-style-type: none"> • Guides and supports direct reports in all aspects of health and safety legislative and company process adherence • Sets functional level objectives for Health and Safety and reports to the Divisional GM • Deploys plans to achieve the functional level objectives • Leads by example in adherence to best practice in health and safety at all times

			<ul style="list-style-type: none"> • Actively and openly discusses health and safety with operational group on a regular basis
4	4 th Tier Management	Supervisor / Foreman (Report to a Manager)	<ul style="list-style-type: none"> • Leads by example in adherence to best practice in health and safety at all times • Actively and openly discusses health and safety with work team on a regular basis • Follows correct procedures and reports accidents / incidents as and when they occur
5	General	All other staff	<ul style="list-style-type: none"> • Takes responsibility for own safety at all times • Actively and openly discusses health and safety with colleagues on a regular basis • Follows correct procedures and reports accidents / incidents as and when they occur

Risk Management

Level	Level Title	Job Title	Responsibility
1	Business Leader	CEO	<ul style="list-style-type: none"> • Directs the work of others in all roles in relation to Risk and Regulatory issues • Sets business level goals and policies for Risk Management and reports to Board of Directors • Deploys plans to achieve the business level goals • Proactive in shaping the Risk Management culture and champions Risk Management principles and best practice • Sets business level policies for System and Information Security
2	Head of Division	Divisional GM	<ul style="list-style-type: none"> • Directs the work of the division in relation to Risk Management across the division • Guides and supports direct reports in all aspects of company policy adherence in relation to risk management and regulatory compliance where relevant • Sets divisional level guidelines/ policies and objectives for Risk Management and reports to the CEO • Deploys plans to achieve the divisional level objectives • Champions Risk Management principles and best practices • Sets divisional level requirements to comply with the System and Information Policies and ensure the Information Security Management System is understood and adhered to
3	3 rd Tier Management	Managers (Report to GM)	<ul style="list-style-type: none"> • Guides and supports direct reports in all aspects of company policy adherence in relation to risk management and regulatory compliance where relevant

			<ul style="list-style-type: none"> • Sets functional level objectives for Risk Management and reports to the Divisional GM • Deploys plans to achieve the functional level objectives • Leads by example in adherence to best practice in risk management at all times • Assists other Managers in identifying, evaluating and responding to strategic, business and operational risks • Champions Risk Management principles and best practices • Incorporates the Information Security Management System, policies and standards into all activities to reduce risk and improve controls. Ensures direct reports understand and adhere to their responsibilities.
4	4 th Tier Management	Supervisor / Foreman (Report to a Manager)	<ul style="list-style-type: none"> • Leads by example in adherence to best practice in risk management at all times • Actively and openly discusses risk management with work team on a regular basis • Assists other Supervisors in identifying, evaluating and responding to strategic, business and operational risks • Champions Risk Management principles and best practices • Incorporates the Information Security Management System, policies and standards into all activities to reduce risk and improve controls. Ensures direct reports understand and adhere to their responsibilities.
5	General	All other staff	<ul style="list-style-type: none"> • Takes responsibility for risk management as it relates to own work activities within the company • Assists the General Manager Finance and the reporting manager to continuously improve those parts of the Risk Register that relate to own role • Ensure all activities comply with the requirements of the Information Security Management System, policies and standards.