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| **Role title:** | Segment and Regional Planning Lead | **Responsible to:** | Head of Segment and Regional Planning |
| **Division:** | Business Development and Engagement | **Department:** | Segment and Regional Planning |
| **Direct Reports and Level:** | None | **Scope:** | Coordination of strategic and country plans for allocated region(s)/segment(s) |
| **Scale:** | No direct reports  Budget – n/a  Allocated Region(s)/segments(s) |
| **Regulated Function(s) Held:** | No |
| **Evaluation Level** | Implement 1 | **Role Family** | Sales, Marketing and Communications |

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| **Overall Role Purpose** |
| The purpose of the role is to define, develop, coordinate and monitor deliver of a single commercial plan for MPS across the allocated region(s)/segment(s) which leads, formulates, develops and drives the acquisition, engagement and retention of members (both individual, group and corporate) across MPS in order to maximise market share and deliver targeted written income and member numbers worldwide |

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| **Accountabilities (RACI)** | **Measures of Success/KPI’s** |
| **Operational**   * Working with the Head of S&RP Planning to determine market & commercial priorities in line with Corporate Objectives * Lead the creation of acquisition, engagement retention plans for their respective regions/segments * Identify capability gaps and put in place process and other improvements to support improvements in acquisition, engagement and retention – e.g. phased targets for progress monitoring, monthly segment reporting * With input from those delivering activities, understand and manage resource commitments on the delivery of plans across the business using key performance metrics (KPI’s) or as otherwise directed by the corporate objectives * Develop, gain sign-off for and then manage delivery of market & segment acquisition, engagement and retention targets through the ownership of strategic acquisition, engagement and retention plans (segment, country, engagement and activity) for each market segment and market * Identify where activity is not implemented or falls short of targets and facilitate activity to mitigate * Together with other planning leads own the cross-functional planning cycle that incorporates all divisions within MPS enabling a cohesive, consistent, inclusive and structured approach to development of a single acquisition, engagement and retention plan. * Input into the 3-year planning cycle that incorporates horizon scanning, corporate risk management and future growth or defence opportunities that enable a clear articulation of future opportunities and threats that can be incorporated into the decision-making process when setting corporate objective * With input from local Business Development (and other) colleagues lead the building of processes that deliver a comprehensive understanding of the competitor environment in each market/segment that informs strategy and planning * Working with the Commercial Services Division to ensure MPS has tailored segment propositions that meet our member needs (portfolio of product, services, price) informed by insight and articulated through compelling value propositions. * Through effective monitoring of appropriate KPIs, and with input from other functions in the BD&E Division (Brand and Marketing, Business Development, Corporate Affairs, Risk Prevention and Direct Sales and Service) ensure that the plans are executed performance is monitored against corporate objective and segment and market targets are met. * Working with Digital and Change colleagues to identify capability gaps, support the production, approval and delivery of vision papers and associated projects. | * Divisional Plan delivery Vs plan * Delivery of projects to plan * Business Development engagement index Vs plan * Business Development leadership index Vs plan * Stakeholder feedback |
| **Financial**   * Input into the setting and delivery of departmental targets ensuring an efficient and effective operating model which minimises cost and maximises contribution to financial sustainability without compromising the member experience. * Use segment and market prioritisation and an understanding of financial metrics to ensure departmental and Divisional resources are allocated in line with expected benefits * Build and implement processes to ensure resources from outside the Division are understood, managed and deliver the required benefits | * BD&E budget Vs Plan * Member numbers Vs plan * Income Vs plan * Retention targets delivered Vs plan * Cost of sales Vs plan |
| **Member**   * Support the Member Experience function in developing the member and brand experience * Bring together market analysis, future market projections, and an understanding of member behaviours, needs and wants to develop data driven market and segment plans. * Using an understanding of regional members and markets identify and prioritise member segments and align to corporate objectives, translating corporate objectives and priorities into commercial objectives and priorities for each market / segment * Support driving a culture and capability in Lean / continuous improvement and project management to drive operational efficiency and great member experiences and outcomes | * Net promoter score * B2B/B2G Pipeline conversion Vs plan * Conversion / retention targets Vs plan * Member feedback * Member Experience Scores |
| **People**   * Take personal accountability for own training, competence, performance and engagement of self and colleagues ensuring clarity on own accountabilities and comply with all governance, policy standards and processes. * Establish a strong network of relationships with subject matter experts and staff at all levels across the organisation, particularly with international BD colleagues, establishing yourself as a trusted and embedded partner. | * Delivery of Personal Development Plan to plan * One to one / performance review meetings Vs Plan * Stakeholder feedback |
| **Risk**   * Adhere to an environment where all colleagues recognise the importance of risk identification and management * Ensure appropriate business processes and controls are in place to manage the Department within risk appetite; comply with policies and regulatory requirements (as applicable). | * Risk & Control Self- Assessments * Audit Actions |

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| **Responsibilities (RACI)** |
| •Ensure MPS understands the specific activity and requirements of the allocated region(s)/segment(s), making clear choices around what constitutes attractive and addressable opportunity within it, prioritising and agreeing plans in partnership with the MPS executive teams and divisions.  •Gain agreement for the necessary resources, prioritisation and commitment across the Business within the planning cycle to support delivery of the plan. |

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| **Key Governance Responsibilities** |
| * Monitor progress, performance and budgets against targets/KPI’s reporting to the income and growth group (IGG) monthly. |

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| **Leadership Framework Competencies** | **Level** |
| Fresh Thinking | Leading others |
| Building Capability in Self and Others | Leading self |
| Influencing Others | Leading others |
| Collaborating for Results | Leading others |
| Leading Self and Others | Leading self |
| Commercial and Risk Thinking | Leading others |

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|  | **Knowledge and Qualifications** | **Skills** | **Experience** |
| **Essential** | * An in-depth knowledge of managing, developing and implementing member/customer strategic plans | * Familiar with determining actionable insight and turning this into effective plans & propositions * Experience in working cross functionally within a matrix management framework demonstrating strong strategic influencing skills with multiple internal stakeholders * Demonstrable project management skills and techniques * Ability to effectively manage information and respond to questions from peers and senior colleagues * The ability to drive cross-functional collaborative working – team building * Strong negotiation and influencing skills * The ability to apply commercial thinking to problem solving | * Strategic planning, marketing and/or business development planning experience within organisations of £50m+ revenue * Proven ability to successfully manage multiple priorities and focus areas |
| **Desirable** | * Post-graduate business/marketing qualification |  | * Experience of B2C & B2B markets within relevant financial services markets * Experience working in a global organisation across time zones * Have an appreciation of Healthcare both in the UK to understand the changing nature of these markets * Financial services/insurance in a regulated environment |