



**UNIT TRUST OF SAMOA (MANAGEMENT) LIMITED**  
**CONTRACTUAL EMPLOYMENT**

**APPLICATION INFORMATION PACKAGE**  
**CUSTOMER RELATIONSHIP MANAGER**

## 1. HOW TO APPLY:

### **I. MAKING AN APPLICATION**

- a. For your application to be considered you **MUST** complete and submit **ALL** these requirements;
- Complete and signed Application Form
  - Certified Copies of all academic achievements/qualifications/training etc.
  - Recently updated curriculum vitae
  - 3 written references (relevant only to this application)
  - Submit a valid police clearance report (issued within the past 3 months)

**ALL INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED FOR SHORTLISTING.**

### **II. SUBMISSION OF APPLICATION**

- a. All applications should be delivered in a seal envelope and address to:

The Chief Executive Officer  
Unit Trust of Samoa (Management) Ltd  
Level 3, Development Bank of Samoa  
Apia, Samoa

- b. Or, e-mail directly to: [viane.tagiilima@utos.ws](mailto:viane.tagiilima@utos.ws)

- c. All applications for the position will be closed on **Friday 31<sup>st</sup> January 2025 at 4.00pm.**

- d. For more information please do not hesitate to contact our HR personnel on email. [fiaputa.lino-toetu@utos.ws](mailto:fiaputa.lino-toetu@utos.ws) or telephone 24969.

**LATE APPLICATION WILL NOT BE ACCEPTED**

## 2. About the Unit Trust of Samoa (UTOS)

UTOS (Trust) is a private trust owned by the Unitholders with its assets entrusted to a Trustee Company which holds in trust the funds of the unitholders. These funds are invested into a diversified portfolio of assets ranging from term deposits, government securities and shares in privately owned companies. Its social objective is inclusivity; allowing for accessible and affordable investment for ordinary Samoans. Its commercial objective is to generate returns for the unit holders.

For more information about UTOS (Trust) and UTOS (Management) Company please refer to the website [www.utos.ws](http://www.utos.ws)

## 3. About the Position:

### **JOB DESCRIPTION**

<b>Job Title:</b>	<b>CUSTOMER RELATIONSHIP MANAGER(‘CRM’)</b>
<b>Reports to:</b>	<b>Chief Executive Officer, Unit Trust of Samoa (Management) Ltd</b>
<b>Supervises:</b>	<b>Unit Trust of Samoa (Trust) Investment Portfolio</b>
<b>Salary:</b>	<b>\$94,624.00 – \$106,452.00 (max) per annum</b>
<b>Term:</b>	<b>Contract for 3 years</b>
<b>Other benefit:</b>	The staff will be entitled to staff benefits as outlined in the <i>Human Resource Management Policy and the Performance Management Manual 2023</i> unless otherwise specified in the contract.

---

### ***Positions Overview***

Customer Relationship Manager role (CRM) is responsible for building and maintaining high quality relationships with unit holders, clients and business partners. Also responsible for promoting the Unit Trust of Samoa (Trust) locally and overseas. CRM will be responsible for communicating latest developments in the performance of the Trust and events to unit holders and the media, which will involve regular interaction through internet, email, telephone, television and any other forms of communication where necessary.

The CRM is expected to be able to convert prospects to potential investors and expected to be able to work in a challenging environment and be flexible in working with the

team to achieve annual targets and Vision of the Company, as described the Corporate Plan, Business Plan and Prospectus.

The CRM is expected to work closely with the rural community, especially with village matais, women committees, church groups and other community organizations. Therefore, the candidate is expected to be fluent in Samoan (both oral and written).

---

## **Duties:**

### **Technical and Strategic**

1. Lead policy formulation and provide strategic policy advice to the CEO in relation to Customer Relationship and marketing plans to attain new investors.
2. Identify new client markets locally and abroad and develop effective engagement strategies for these markets.
3. Create a positive rapport with existing and new investors to increase the purchasing of Units to fund the investment portfolio.
4. Provide existing and new product development to potential and existing unitholder(s) with the goal of increasing the number of registered unitholders each year.
5. Manage new appropriate services to meet unitholder needs. (eg: Digital Platforms)
6. Conduct and coordinate consultations, programs and meetings with potential and existing unit holders. (rural community)
7. Prepare and submit budget proposals for funding of customer relationship awareness programs and report on the outcome of these awareness campaigns.
8. Ensure the participation of the Unit Trust in regional and international business forms and trading partners and comply with AML regulatory requirements.
9. Ensure to collaborate with the Central Bank of Samoa in screening of unitholders' application to ensure compliance with AML (Finance Intelligence Unit).
10. Lead and adapt to change and proactively drive improvement to services in the customer relationship unit.
11. Conduct promotion/awareness initiatives for the Unit Trust of Samoa.
12. Coordinate and Facilitate preparation of the Unit holders Annual General Meeting each year.
13. Identify and reconciled the Unit Registry System on a monthly basis

### **Monitoring and Evaluation**

1. Lead the team in undertaking monitoring and evaluating of policies and procedures pertaining to customer relationship operation.
2. Analyze issues from customer relation policies to inform policy recommendations and interventions where necessary.
3. Identify issues with the implementation of the digital marketing platform where necessary.
4. Assist the Chief Finance Officer in the preparation of relevant financial reports for funding needed for Unitholder investment.

**Leadership and Management**

1. Actively participate as part of the Leadership and Core Executive Management Team in the decision-making and governance processes of the organization.
2. Lead and be a role-model ambassador that follows the UTOS Values for the organization and public community.
3. Develop, implement and review customer relationships related policies, in support of the UTOS current Business Plan.
4. Provide on the job support and coaching as well as training for team members to ensure their continuous professional development.
5. Lead and manage the core functions of the Unit Trust of Samoa (Management) Ltd in order to foster quality assurance and ethical standards of all services and be accountable for the effective and efficient usage of resources.
6. Assist in the development and implementation of the following Company Reports/Plans
  - a. Prospectus
  - b. Corporate Plan
  - c. Business Plan
  - d. Performance Management Plans/Appraisals
  - e. And any other relevant plans/reports.
7. Collaborate with Human Resource Unit to develop training resources and materials on relevant technical trainings.
8. Represent the Company in local and international forums when required.
9. Act as Chief Executive Officer when required.

***Qualification:***

<p><b><i>Essential:</i></b></p> <ul style="list-style-type: none"> <li>• A relevant commerce degree, in Finance, Business Administration or Marketing or an equivalent field.</li> </ul>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

***Skills/Knowledge***

<b><i>Essential</i></b>	<b><i>Desirable</i></b>
<ul style="list-style-type: none"> <li>• Proven knowledge and understanding of UTOS Management and Trust operations, UTOS investment portfolio, investors and key shareholders.</li> <li>• At least (7) years' experience in the marketing &amp; promotion, public relations and customer services.</li> <li>• Proven excellent written and oral communication skills in Samoan and English.</li> <li>• Ability to work as a team member as a proactive team player.</li> </ul>	<ul style="list-style-type: none"> <li>• Proven experience in development of effective strategies for marketing &amp; promotion, public awareness campaigns including road shows.</li> <li>• Proven experience in conducting presentations to large audiences and public consultations.</li> <li>• Proven experience in interacting with the media community, including media conferences and press release.</li> <li>• Proven experience in banking, investment, and finance or managed funds.</li> <li>• Proven familiar with MS Office software and graph designs.</li> </ul>

---

### **Key Behaviors**

All Employees are measures against the following Key Behaviors as part of Performance Appraisal Plan.

- Commitment / Personal Accountability
- Professional
- Integrity
- Intellect and Judgment
- Creative and Innovation
- Teamwork

### **Benefits**

***Duration:*** 3 years term contract

***Salary:*** \$94,624.00 – \$106,452.00 (Max)

***Hours of Attendance:*** The standard hours of attendance are Monday to Friday from 9.00am to 5.00pm excluding Public and Commission holidays that are generally observed in the public service and declared by the Commission.

***Performance Reviews:*** The Appointee's performance shall be reviewed in accordance with the Performance Management Guideline.

***Annual Leave:*** 20 days annual leave per annum

***Sick Leave:*** 20 days sick leave per annum.

***Other Leave:*** All other leaves are subjected to the rules set out in the UTOS Human Resource Management Policy Manual 2023.

***End of Contract Benefits:*** The Appointee is entitled at the expiry of the Contract Term, to a payment equivalent to 10 working days for every contract year served at the salary rate paid to the Appointee on cessation of employment.

***National Provident Fund:*** 10% contribution, fortnightly salary

***Accident Compensation Corporation:*** 1% levy, fortnightly salary

***Duty Travel:*** Approval of the Board of Directors