



# Workflow Automation Specialist

## Specifics

### Reporting to

Customer Relationships Enablement Lead

### Practice/ Team

Enablement Team

### Business Service

Customer Relationships

### Date

May 2025

## Welcome

**We're committed to making energy cleaner and cheaper for Aotearoa New Zealand.**

Our Retail structure is made up of a network of empowered teams, united by a shared purpose and clear goals, equipped with the skills and capabilities to deliver value to customers end to end.

The way we work is just as important as the work itself. Alongside our Meridian Values, we are guided by three key behaviour shifts: 'Make people awesome', 'Set your compass on customers' and 'Progress over perfection'.

## Role Purpose

The Workflow Automation Specialist helps make performance data easier to access and act on by automating manual processes and improving workflows. Working with hub leads and the Service Enhancement team, they turn data into actionable insights that drive high-performance outcomes and free up our teams to focus on what matters most—delivering value to our customers.

## Responsibilities

- **Workflow Automation:** Design, build, and maintain automated workflows and reporting tools to streamline recurring tasks and improve overall efficiency.
- **Data Insights:** Generate accurate operational and performance data to support daily operations, performance monitoring, and strategic decision-making. Present insights in clear, actionable formats (e.g., dashboards, visualisations, reports) to support planning, prioritisation, and continuous improvement initiatives.
- **Business Acumen:** Develop a good understanding of the Customer Relationship Team's strategy and deliverables and use your understanding of data to improve workflow/processes to add demonstratable value.
- **Process Automation:** Evaluate existing workflows, identify improvement opportunities, and implement changes that reduce friction and complexity for frontline teams.
- **Agile Contribution:** Actively contribute to agile ceremonies and delivery cycles to deliver iterative improvements and value.
- **Collaborative Delivery:** Build strong relationships and partner with other Enablement specialists, service teams, and stakeholders to deliver integrated initiatives that support service performance and operational goals.

## Skills and Experience

- Demonstrated ability to design and implement workflow or data automation solutions.
- Proven experience in performance and operational data analysis, reporting, and visualisation.
- Experience in reviewing and enhancing processes or workflows to improve service outcomes.
- Collaborative and proactive approach to working across multiple teams and disciplines.
- Strong communication skills, with the ability to convey technical insights in an accessible way.
- Outcome-oriented and self-motivated, with a strong bias toward action and a commitment to delivering value through small, iterative improvements.





# Enabling Team Member

## As a member of an Enabling Team, I am

- A subject matter expert within my area of expertise with a deep understanding of my functional area/craft
- Focused on supporting and empowering Squads, Value Streams and other Enabling teams with specialist advice and support
- Curious and innovative and passionate about customer experience and value

## And, I am not

- A solitary specialist working independently without engaging with other teams or the wider business context.

## Role Purpose

Provide critical enabling capabilities to make Squads and other teams more efficient, faster and independent

Support Value Streams and Business Services by providing specialist advice, knowledge, and skills development

## Structure

Enabling Teams deliver work which allows other areas of the business to deliver on their goals, objectives and KPIs.

Enabling Teams will also have their own goals, KPIs and quarterly plans.

Enabling team members may be allocated to a squad to help provide specific inputs or services

## Skills and Mindsets

### Subject Matter Expertise

- Deep understanding of the specific functional area or craft
- Ability to translate complex technical concepts into practical solutions

### Individual skills

- Excellent communication and collaboration abilities
- Adaptability and problem-solving skills in dynamic environments

### Mindset

- Growth-oriented, with a focus on continuous improvement and learning
- Empowering and supportive, fostering independence and efficiency in teams
- Customer-centric, with a commitment to delivering value and aligning with business goals
- Thought leadership mindset, staying ahead of trends and driving innovation within the area of expertise.

## Key Responsibilities

### Deliver quality outputs

- Adhere to frameworks and guidelines to deliver with consistency and to set standards
- Maintain toolkits and frameworks for the business to use
- Challenge to continuously improve the quality and speed of output delivery
- Support achievement of enabling team goals and KPIs

### Teamwork – Make people awesome

- Foster a growth mindset, encouraging your team-mates to embrace challenges, persist through setbacks and treat every experience as an opportunity to learn
- Be a valuable & contributing member of relevant teams
- Support teams to build knowledge and capabilities to become independent and empowered