

Sales Operations Specialist position outline

September 2026





The Lifestyle story

Since beginning Lifestyle Communities® in 2003, our mission has always been to enable working, semi-retired and retired people over 50 to downsize in a secure community with resort-style amenities, while having the freedom to enjoy new possibilities with greater peace of mind.

Our first community was at Brookfield in Melton, and over the years we have kept improving on what we do based on the feedback from our customers and homeowners. We have grown the business on two core principles;

1. **“You never get a second chance at a first impression”** and we ensure that whether it is the look of our communities or the service we deliver, our customers always get a fantastic first impression.
2. **“A customer may forget what you told them, but they will never forget how you made them feel”**. We want to make every customer touchpoint an amazing experience, one that they will remember and recall with friends and family.
We want to ensure that their experience living in Lifestyle Communities is an extremely positive one.

These two principles have been the key enabler of our growth and success over the years and will become even more important as we develop and grow.

Our purpose

We reimagine a Way to Live for independent downsizers.

We develop and manage architecturally designed low maintenance homes, together with resort-style communities, that allow downsizers to free up equity from their previous home, and live the life they want.

Our approach revives the spirit of strong, neighbourly connections while providing spaces that balance safety and privacy with community engagement.

We nurture these environments, with dedicated Lifestyle Managers that live onsite allowing homeowners to enjoy independence alongside an active lifestyle.

Now that's a ...**Way to live**



Role summary

The Sales Operations Specialist provides operational, analytical and systems support to the Sales Leadership Team and broader sales function.

The role supports the effective use of sales systems, processes, reporting and data to improve operational efficiency, sales performance and customer outcomes.

Working closely with Sales, Digital Marketing, Finance and other support functions, the Sales Operations Specialist helps translate business requirements into practical solutions. This includes maintaining reports and dashboards, supporting system and process improvements, monitoring data quality and providing stakeholders with timely operational support.

The role requires someone who is analytical, organised and comfortable working across systems, processes and people. The successful candidate will enjoy working with data, identifying trends and providing clear insights that support business discussions and decisions.



Who am I?

I am a passionate person that really enjoys working in a highly engaged and supportive environment to deliver **amazing** service to our team and customers. I have an absolute **passion** about customer service and believe that delivering amazing customer service should be in every business' ethos.

I have **high empathy** and can put myself in the shoes of team members and our homeowners to understand their needs and how to provide an experience that exceeds their expectations.

I have **high EQ** and my working style is one of **collaboration** and **consultation**. I see this role as both **challenging** and **rewarding**.

I am eager to grow my skill set whilst at the same time using my experience to achieve and drive results and **make a real difference**.

I continually seek to improve the overall experience for our team members and homeowners. I am excited to **think outside of the box** and constructively challenge the business to be exceptional in all that we do.

I treat everyone with **respect** and show humility in all interactions. I believe that Lifestyle Communities makes a real difference to our customers lives and I work to ensure that I can also make a difference to what we do and the service and product we deliver.

I am **thoughtful, compassionate, kind** and **value relationships**.

I work for Lifestyle Communities!



Our values

Our values drive all our interactions with our customer.

We know that by living these values we can deliver excellent customer service to all stakeholders and believe that these values differentiate us from other operators in this sector.



**Do it from
the heart**



**Constantly
curious**



**Own it.
Sort it.**



**Strive for
excellence**

Position title	Sales Operations Specialist
Reports to	Sales Strategy and Optimisations Manager
Direct reports	NA
Location	Support Office Travel to various communities across Victoria as required.
Employment type	Full Time
Department	Sales
Key relationships	Internal • Sales Strategy & Optimisation Manager • Executive General Manager, Sales • Area Sales Managers • Retail and Contact Centre leadership • Finance Business Partners • Digital Marketing Team • Marketing Team • People Experience Team • Broader Sales Team External • Technology vendors • Service providers • Salesforce and DocuSign partners • Relevant industry suppliers



Sales Operations Specialist

Commercial Insights & Analytics

Key tasks / deliverables	What will success look like?
• Develop and maintain sales dashboards, regular reports and performance measures. • Analyse sales, enquiry, conversion, appointment, settlement and customer journey data. • Monitor performance trends and highlight relevant observations, opportunities or risks for review. • Assist with pricing analysis, demand forecasting and sales planning activities. • Prepare monthly and quarterly performance reporting for Sales Leadership. • Investigate data questions and provide clear, evidence-based findings. • Translate data into straightforward insights that can be understood by a range of stakeholders. • Support operational projects and business initiatives through analysis, reporting and basic modelling. • Maintain reporting documentation, definitions and calculation methodologies. • Work with stakeholders to understand reporting requirements and improve the usefulness of reporting outputs.	• Reporting is accurate, consistent and delivered on time. • Stakeholders have access to relevant and easy-to-understand performance information. • Data trends and potential issues are highlighted promptly. • Analysis supports productive discussions and informed decision-making. • Reporting questions and data requests are addressed efficiently. • Dashboards and reports remain relevant as business requirements evolve.
Sales Operations & Process Improvements • Maintain and support sales processes across the customer journey. • Review existing workflows and identify potential gaps, duplication or inefficiencies. • Recommend practical process improvements for consideration by the Sales Strategy & Optimisation Manager. • Assist with the implementation of approved process improvements and operational initiatives. • Develop and maintain process maps, procedures, checklists and user guides. • Support the consistent application of sales processes across developing and established communities. • Help ensure sales processes align with relevant compliance and governance requirements.	• Sales processes and operating procedures are current, clearly documented and accessible. • Team members understand how key processes should be completed. • Process gaps and inefficiencies are identified and addressed. • Approved operational improvements are implemented effectively. • Process changes are communicated clearly and supported with appropriate documentation. • Sales teams can spend more time on customer-facing and value-adding activities. • Customer and team experiences continue to improve.

Systems & Data Governance

- Support referral, contract administration, incentive and settlement-related processes.
- Coordinate operational activities and follow up agreed actions with relevant stakeholders.
- Gather stakeholder feedback to help identify opportunities to improve team and customer experiences.
- Assist with testing and documenting new processes before implementation.
- Monitor the effectiveness of implemented improvements and report on outcomes.

- Provide day-to-day support for Salesforce, DocuSign and other relevant sales systems.
- Develop strong working knowledge of sales systems and their supporting processes.
- Maintain dashboards, reports, price books and relevant system information.
- Monitor data quality and complete regular data and process audits.
- Identify data quality issues and work with relevant users to correct them.
- Support agreed data governance, system compliance and record management requirements.
- Partner with Technology and system owners to investigate system issues and coordinate resolutions.
- Gather and document business requirements for minor system improvements.
- Assist with user testing, implementation and communication of system enhancements.
- Support pricing uploads, CPQ administration and relevant system configuration activities.
- Maintain system guides, procedures and training materials.
- Deliver system training, refresher sessions and user support as required.
- Monitor system adoption and highlight recurring issues or training needs.
- Escalate significant system, data or compliance issues to the appropriate manager or system owner.

- Sales data is accurate, reliable and suitable for reporting.
- Data issues are identified, investigated and corrected promptly.
- Dashboards and reports reflect consistent and trusted information.
- Approved pricing and system updates are completed accurately.
- Salesforce, DocuSign and related systems are used consistently.
- System users receive timely and practical support.
- System enhancements are appropriately tested, documented and communicated.
- Compliance and data governance requirements are supported.

Stakeholder Support & Enablement

- Build effective working relationships across Sales, Finance, Digital Marketing, and Marketing.
- Provide day-to-day operational and systems support to Area Sales Managers and the sales team.
- Respond to stakeholder queries and coordinate support or escalation where required.
- Prepare reports, presentations and business updates for Sales Leadership.
- Assist with sales meetings, development days and operational forums.
- Deliver practical training and education on systems, processes and reporting.
- Support the onboarding of new sales team members, including system access and process education.
- Maintain training resources, process documentation and relevant SharePoint content.
- Communicate system, data and process changes clearly to affected stakeholders.
- Work collaboratively across departments to support agreed business priorities.
- Track stakeholder requests and ensure actions are followed through.
- Identify recurring questions or issues that may require additional training, process clarification or system improvement.
- Escalate complex or high-risk matters to the appropriate manager or subject matter expert.

- Stakeholders receive accurate, practical and timely support.
- Operational and systems queries are resolved or escalated appropriately.
- Training materials are clear, current and easy to use.
- New team members receive the support required to use systems and follow processes confidently.
- Business updates and presentations are accurate and professionally prepared.
- Stakeholders understand changes to systems and processes.
- Strong and collaborative working relationships are maintained.
- Recurring support issues are addressed through improved documentation, training or processes.



What will success feel like for you?

In addition to fulfilling the requirements listed in this position outline, you will be inspired and challenged, and your learning curve will be steep. You will genuinely believe in the purpose of the business, and you will wake up eager to start the working day where your contributions are valued and rewarded.

The key challenges of this role

- Building credibility as a reliable and knowledgeable member of the sales function by consistently delivering accurate reporting, practical operational support and effective systems assistance.
- Balancing competing requests from Sales leaders and teams while maintaining reports, investigating data questions, supporting core processes and responding promptly to operational and system-related matters.
- Maintaining accurate data, consistent processes and effective system use in a changing sales environment, while supporting a positive experience for both team members and customers.
- Continuing to build capability across sales operations, reporting, systems and continuous improvement, with the expectation of taking on more complex analysis and operational activities over time.

Our ask of you

We have a strong history up to today and we need passionate, motivated and entrepreneurial team members to challenge the status quo.

By joining the Lifestyle Communities team, you are committing to give it your all, live our values, take some risk and make a difference. That is all we ask.

I _____, understand the key deliverables and values of Lifestyle Communities, and will execute my role as **Sales Operations Specialist** to reflect this position outline.

Signature

Date

