



# Current Vacancies

---

<b>Role:</b>	<b>COMMERCIAL BROKER</b>
<b>Branch:</b>	Rothbury Southland Ltd
<b>Location:</b>	Invercargill
<b>Posted:</b>	August 13 <sup>th</sup> , 2009

---

## 1. Purpose

- 1.1. To provide advice, service, management, and general insurance assistance to clients.
- 1.2. To retain and grow clients insurance portfolios.
- 1.3. To generate revenue by matching client requirements to insurer terms.

## 2. Key Customers

### External

Clients

Insurer – Broker liaison; Insurers and Insurers' Claims personnel

### Internal

The Rothbury Southland team

## 3. Key Accountabilities

### 3.1. General

- 3.1.1. To build a full knowledge and understanding of our client's business and develop your own commercial acumen to be able to recommend appropriate solutions including insurance covers.
- 3.1.2. To actively work to maintain market awareness and develop insurance knowledge through continuing education.
- 3.1.3. Deliver prompt service to meet clients' ever changing expectations.
- 3.1.4. To use sound planning and organisation to manage all aspects of portfolio management including, follow-up dates, re-marketing, renewals etc.

### 3.2. Existing client portfolios

#### 3.2.1. Reviewing

- 3.2.1.1. To review clients on an annual basis and record findings. Either by phone or face to face.
- 3.2.1.2. To grow existing client portfolios by identifying and acting on opportunities for growth (use the unique relationship and knowledge of client's business to achieve this)
- 3.2.1.3. To place appropriate cover on time including renewal of client portfolios in accordance with required standards.

3.2.1.4. To arrange risk consulting services for our existing clients as needed.

**3.2.2.Remarket**

3.2.2.1. To remarket clients portfolios or selected components at renewal as required.

3.2.2.2. To prepare complete insurers submissions in order to obtain the best terms available, fully manage the process and present the findings in writing to the client.

**3.3. New Business Development**

3.3.1.To develop new clients through effective use of networks and own research. Use market knowledge to 'pitch' for new business. (for example when a potential commercial client is reviewing their insurance.)

3.3.2.To manage a clients portfolio and to be aware of circumstances where there is to be a business sale or business closure.

**3.4. Other Responsibilities**

3.4.1.Ensure premiums are collected promptly.

3.4.2.Work in well with broker support team, claims and accounts personnel.

3.4.3.Work in line with internal procedures, practices and technology driven initiatives to streamline workflow and standardise processes for maximum efficiency. Adopt 'best practice' servicing models and process models as these are developed and introduced.

3.4.4.Measure and report on achievement of client service through 'client questionnaire' and other survey measures as appropriate.

3.4.5.Actively contribute to the direction of Rothburys and support the strategic direction and any new initiatives.

3.4.6.Transfer skills and mentor broker support team as part of our succession plan.

3.4.7.Achieve annual/monthly performance targets. Targets are set, and regularly reviewed, in conjunction with the Branch Manager.

3.4.8.Meet reporting requirements on time and in requested format.

To apply please forward a CV to Christine Morris-Eyton,  
E. [christine.morris-eyton@rothbury.co.nz](mailto:christine.morris-eyton@rothbury.co.nz) T. 09 579 9551