



POSITION DESCRIPTION

Domestic Broker	
BRANCH Southern Lakes	DATE January 2019
REPORTS TO Team Leader	EMPLOYMENT TERM Permanent / Full time

PURPOSE

- Administration and management of our domestic insurance portfolio
- Resolution of client queries on domestic cover, account queries, claims satisfaction

KEY RELATIONSHIPS

INTERNAL	EXTERNAL
<ul style="list-style-type: none"> ▪ Rothbury Southern Lakes Team ▪ Leader – Business Development & Sales ▪ National Domestic Manager 	<ul style="list-style-type: none"> ▪ Insurers ▪ Commercial & Domestic Clients

KEY ACCOUNTABILITIES

RESPONSIBILITY	KEY DUTIES AND EXPECTED OUTCOMES
General	<ul style="list-style-type: none"> ▪ Resolve client queries on their domestic insurance (account queries; cover queries; policy amendments etc). Proactive follow through to ensure effective resolution ▪ Investigate client account to ascertain whether the policy is the right one for the client. Set fee level within approved discretionary guidelines ▪ Check the correct type of domestic cover and level of cover for the client and amend as appropriate ▪ Efficient and accurate processing of Domestic Insurance renewals, endorsements, and cancellations ▪ Liaise with insurers on domestic insurance matters, i.e. renewals, new business, re-marketing etc. ▪ Re-market domestic policies at renewal as required. Optimise insurance cover in line with approved practices ▪ Refer leads to commercial broking ▪ Process finance agreements in Odyssey for policies that are paid monthly ▪ Work to achieve monthly targets. ▪ Plan workload to factor in key renewal times and peak periods ▪ Consistent review of processes to optimise efficiency

KEY PERFORMANCE INDICATORS

- Excellent client service (internal and external) evidenced by feedback
- Timely and accurate processing of Domestic Insurance Transactions
- Resolution of queries achieved or referred for assistance (no unresolved policy issues)
- Appropriate use of discretion evidenced in fee levels and selecting right policy for the client
- Good results in re-marketing domestic policies at renewal, maximising each opportunity
- Referral of business opportunities to the Commercial team

- Gathering and sharing market information with colleagues and brokers to realise all potential business opportunities

PERSON SPECIFICATION

FORMAL QUALIFICATIONS AND KNOWLEDGE

- Level 4 National Qualification (or working towards)
- PIB (Professional Insurance Broker) recognised
- Understanding of the Insurance Industry

SKILLS AND ATTRIBUTES

- Pleasant inter-personal skills
- Good communication
- Able to work with autonomy
- Proven team player
- Able to organise own workload and manage time effectively
- Understanding of the domestic insurance market, policies and legislation
- Proven ability to build rapport and retain key clients
- Effective sales skills
- Excellent attention to detail
- Will use initiative
- Computer literacy (Microsoft Word, Excel)

SUGGESTED TRAINING COURSES

GENERAL INSURANCE

- Financial Advisers Act & Code of Conduct
- Professional Conduct & Code of Ethics (PPS Workshop 1)
- Professional Conduct & Client Care (PPS Workshop 2)
- Professional Conduct & Insurance Contracts (PPS Workshop 3)
- Intro to Insurance (IBANZ Short Course for new Brokers)

TECHNICAL

- Domestic Policy Training (In house with Insurers)

SALES

- Selling over the Phone
- Building Relationships
- Sales Strategies / Techniques

PROFESSIONAL DEVELOPMENT

- Complaints Management & Disputes Resolution
- Coaching & Mentoring
- Time Management
- Rothbury Foundation Programme

OTHER

- Swift Training
- Excel - Essential Skills & TimeSaving Features
- Word - Essential Skills & Timesaving Features

To register your interest in this role please submit both your CV and covering letter to

recruitment@rothbury.co.nz