



POSITION DESCRIPTION

Instalment Administrator	
BRANCH Group	DATE January 2019
REPORTS TO General Manager – Instalment Services	EMPLOYMENT TERM Permanent / Full Time

PURPOSE

- To provide administrative and customer service support to the Instalment Services clients ensuring efficient and effective client service.
- To achieve maximisation of cash flow through Rothbury Instalment Services from effective credit management.

KEY RELATIONSHIPS

INTERNAL	EXTERNAL
<ul style="list-style-type: none">▪ Rothbury Branch Managers▪ Brokers & Broker Support Teams	<ul style="list-style-type: none">▪ Insurance Clients▪ Insurers

KEY ACCOUNTABILITIES

RESPONSIBILITY	KEY DUTIES AND EXPECTED OUTCOMES
General	<ul style="list-style-type: none">▪ Work with Instalment Administrators to ensure finance company direct debits and administration are delivered in a timely and effective manner▪ Credit management for Rothbury Instalment Services on payment arrears and handling of daily dishonors process.▪ Assist in loading new agreements, and send out finance agreement documentation for Rothbury clients.▪ Providing expert customer service and assistance to clients when they call. Also some outbound calls to discuss payments with clients.

KEY PERFORMANCE INDICATORS

- Accurate, timely processing of all finance agreements and supporting documentation
- Effective credit management following up on outstanding payments where required
- Build strong relationships and work collaboratively with all stakeholders
- Excellent client service as evidenced by feedback from relevant stakeholders

PERSON SPECIFICATION

FORMAL QUALIFICATIONS AND KNOWLEDGE
<ul style="list-style-type: none">▪ 3+ years Financial Services experience (required)▪ Customer service experience (required)▪ Insurance or lending industry knowledge (preferred)▪ Credit control knowledge (preferred)▪ Basic accounting administration/principals (preferred)

SKILLS AND ATTRIBUTES

- Excellent attention to accuracy and detail
- Computer literacy – particularly Excel and Word
- Self management and initiative
- Ability and willingness to multi-task
- Numerate
- Flexible and willing to learn new tasks.
- Focused on innovation
- Ownership of personal development and knowledge
- Strong communication skills
- Friendly and approachable manner
- Effective time management skills

SUGGESTED TRAINING COURSES

PROFESSIONAL DEVELOPMENT

- Time Management

OTHER

- Excel - Essential Skills.
- Word - Essential Skills.

The position description is intended to describe the general nature and level of work being performed by incumbents in the assigned job. They are not construed as an exhaustive list of all responsibilities, duties, or skills required of the incumbent. From time to time, personnel may be required to perform duties outside of their normal responsibilities as needed.

To register your interest in this role please submit both your CV and covering letter to recruitment@rothbury.co.nz