



POSITION DESCRIPTION

Commercial Broker Support	
BRANCH Auckland	DATE July 2018
REPORTS TO Team Leader	EMPLOYMENT TERM Permanent / Full time

PURPOSE

- Supporting a commercial broker in the retention and growth of their portfolio
- Assisting in generating revenue by matching client requirements to insurer terms

KEY RELATIONSHIPS

INTERNAL	EXTERNAL
<ul style="list-style-type: none"> ▪ Rothbury Auckland Team ▪ Leader – Business Development & Sales ▪ Claims Team 	<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"> ▪ Timely and accurate processing of renewals, new business, alterations and cancellations ▪ Set up new policies, process finance agreements for policies that are paid monthly, send out proposals and follow-up as necessary ▪ Work with the Broker to ensure premiums are collected within the required timeframe ▪ Deliver friendly, helpful and prompt service to meet clients’ ever changing expectations ▪ 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 ▪ Through sound planning and organisation assist the Broker to manage all aspects portfolio including, follow-up dates, re-marketing, renewals etc ▪ Assist the Broker to achieve annual / monthly performance targets
Other	<ul style="list-style-type: none"> ▪ Develop and maintain meaningful working relationships with broker support team, claims and accounts personnel ▪ Develop and maintain meaningful working relationships with Insurers ▪ 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 ▪ Actively work to maintain market awareness and develop insurance knowledge through continuing education ▪ Actively contribute to the direction of Rothbury and support the strategic direction and any new initiatives

KEY PERFORMANCE INDICATORS

- Excellent client service, evidenced by client and team feedback
- Support to brokers provided within time constraints to meet both the objectives of our clients and achieve our business goals
- Active contribution to the achievement of the team's monthly targets
- 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)
- Commercial Fire & General Insurance experience

SKILLS AND ATTRIBUTES

- Strong initiative and self-starter attitude
- Excellent inter-personal skills (written & verbal)
- Excellent communication skills
- The right attitude
- Numerate
- Team player
- Strong time management skills
- High level of accuracy and attention to detail
- Good Self Awareness and listening skills
- 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 staff new to the Industry)

TECHNICAL

- Directors & Officers
- Business Interruption
- Statutory Liability Insurance
- Professional Indemnity
- Material Damage
- Commercial Motor Vehicle

SALES

- Building Relationships

PROFESSIONAL DEVELOPMENT

- Time Management

OTHER

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

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.