



POSITION DESCRIPTION

Claims Adviser	
BRANCH Asian Broking Team - Auckland	DATE April 2019
REPORTS TO National Claims Manager	EMPLOYMENT TERM Permanent / Full time

PURPOSE

CLAIMS ADVISER
<ul style="list-style-type: none"> Effective and timely management of the claims process between the client and the underwriter

KEY RELATIONSHIPS

INTERNAL	EXTERNAL
<ul style="list-style-type: none"> Leader – Business Development & Sales Rothbury Auckland Team National Claims Manager 	<ul style="list-style-type: none"> Clients Insurers Insurers Claims Department

KEY ACCOUNTABILITIES

RESPONSIBILITY	KEY DUTIES AND EXPECTED OUTCOMES
General	<ul style="list-style-type: none"> Liaise with client and underwriter throughout the claim process to facilitate the process well/ efficiently Follow-up with underwriter within set time frame to ensure client has the required authority/payment to proceed with repairs etc. Ensure all Underwriters settled claims received are completed in the system before the EOM close off Ensure all required supporting information is attached to claims before forwarding to underwriter Responsibility for ensuring all Claims are dealt with (loaded, lodged etc) in a timely and correct manner Responsibility for managing the claims process and ensuring all claims are dealt with in a timely and accurate manner Appoint assessors for a claim when required Complete diary notes on a daily basis to ensure underwriters and clients are followed up in appropriate and timely manner Manage workload in the claims area to meet deadlines and prevent a backlog of claims for settlement Follow-up with insurer within set time frame to ensure client has the required authority/payment to proceed with repairs etc. Maintain flexibility as key accountabilities of the position change to meet the changing needs of our business as we grow, and also meet the needs of our clients

KEY PERFORMANCE INDICATORS

- Ensure Claims paid promptly and within policy cover. All claims should be settled within 3 months other than in exceptional circumstances
- Develop and maintain excellent working relationship with the claims departments of insurers
- Ensure all phone calls for claims are taken in a prompt and professional manner, ensuring all clients are kept well informed of their claim progress
- All notes are recorded in the system on the day of receipt
- Timely follow-up and resolution of complex claims that cannot be resolved within the 3 month time frame
- Good liaison with commercial and domestic team so they are well informed in regard to their clients claim settlement
- Excellent client service, evidenced by client and team feedback

PERSON SPECIFICATION

FORMAL QUALIFICATIONS AND KNOWLEDGE

- PIB (Professional Insurance Broker) recognised
- Commercial claims experience
- Understanding of the Insurance Industry

SKILLS AND ATTRIBUTES

- Excellent Bi-lingual communication skills, must be able to speak and write to a high standard in Mandarin and Cantonese
- Communication skills – an excellent phone manner is critical to the success of the role, along with the ability to develop good relationships with clients
- Excellent attention to accuracy and detail
- High level of Inter-personal skills (written & verbal)
- Numerate
- Understanding of the insurance market, policies and legislation
- Team player
- Strong analytical skills
- Comfortable working with autonomy (ability to prioritise and manage workload efficiently)
- Ability to develop rapport and display the appropriate level of empathy with the client to achieve this. (Our Claims area of the business exists to provide 'outstanding service' – this is the reason our clients have insurance)

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)

TECHNICAL

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

SALES

- Building Relationships
- Negotiation Skills

PROFESSIONAL DEVELOPMENT

<ul style="list-style-type: none">▪ Complaints Management & Disputes Resolution▪ Problem Solving & Critical Thinking▪ Time Management
OTHER
<ul style="list-style-type: none">▪ Advanced 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**