



POSITION DESCRIPTION

Commercial Broker Support	
BRANCH Wellington	DATE May 2019
REPORTS TO Leader – Business Development & Sales	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 Wellington 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 5 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

Team Leader

BRANCH Wellington	DATE May 2019
REPORTS TO Leader – Business Development & Sales	EMPLOYMENT TERM Permanent / 20% of role

PURPOSE

- Provide leadership to the commercial broker support team by offering ongoing coaching, mentoring and support.
- Enable team to achieve personal and professional goals, to get the best out of individuals and team-based work.
- Oversee the day-to-day administrative and business functions that support the running of the branch.

KEY RELATIONSHIPS

INTERNAL

- Rothbury Wellington Team
- Leader – Business Development & Sales
- Rothbury People & Culture team

KEY ACCOUNTABILITIES

RESPONSIBILITY	KEY DUTIES AND EXPECTED OUTCOMES
Leadership	<ul style="list-style-type: none"> ▪ Maintain an awareness of the day to day dynamics of the commercial broker support team. ▪ Organise monthly team meetings with a set agenda. Discussion items could include current workloads, staffing levels, upcoming priorities etc. ▪ Complete monthly one on ones with team members to discuss and review; results, workload, current challenges, performance, training and career development. ▪ Provide constructive and meaningful feedback with the aim to coach and mentor staff and / or to focus on areas that may need further development, improvement or are challenging. ▪ Where issues arise, provide timely feedback to avoid continued undesirable behaviours. Challenge staff as required as part of raising awareness, limiting beliefs, patterns and behaviour. ▪ Feedback to Manager regularly to keep them up to date on the current status of the team. ▪ Complete the yearly performance review process ensuring all team members have a meaningful review providing feedback and guidance and relevant development plan as an outcome. ▪ Complete the yearly remuneration review process ensuring all the team have a meaningful one on one discussion around achievements and expectations. Provide recommendations to Manager and deliver final remuneration review documentation. ▪ Ensure training and skills transfer to existing team & when new members join the team

RESPONSIBILITY	KEY DUTIES AND EXPECTED OUTCOMES
	<ul style="list-style-type: none"> ▪ Share knowledge and communicate changes to keep team well informed. Plan integration of changes factoring in impact on clients and current processes to effect a smooth transition
Operational	<ul style="list-style-type: none"> ▪ Manage the daily and operational activities (including credit management, stationary orders, etc.). These should be delegated amongst the team accordingly and oversight provided to ensure timely completion. ▪ Manage and co-ordinate internal support staff to ensure effective business operations and cover over periods of leave and fluctuations in workloads. ▪ Plan workloads to factor in key renewal times and peak periods. ▪ Review processes to optimise efficiency. ▪ Undertake monthly KPI checks and authorisation for team.

KEY PERFORMANCE INDICATORS

<ul style="list-style-type: none"> ▪ Effective staff management, delegation and utilisation of resources to ensure the smooth running of the branch. ▪ In conjunction with the Leader – Business Development & Sales create a culture of feedback and collaboration.
--

AUTHORITIES

STAFF REPORTS
<ul style="list-style-type: none"> ▪ Commercial Broker Support team ▪ Claims Advisers ▪ Domestic Brokers

PERSON SPECIFICATION

FORMAL QUALIFICATIONS AND KNOWLEDGE
<ul style="list-style-type: none"> ▪ Experience leading a team
SKILLS AND ATTRIBUTES
<ul style="list-style-type: none"> ▪ Good self-awareness and listening skills ▪ Excellent interpersonal skills ▪ Excellent communication skills ▪ Coaching & mentoring skills

SUGGESTED TRAINING COURSES

PROFESSIONAL DEVELOPMENT
<ul style="list-style-type: none"> ▪ Rothbury Foundation Programme ▪ Coaching & Mentoring

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