



POSITION DESCRIPTION

Domestic Broker	
BRANCH Tauranga	DATE May 2019
REPORTS TO Team Leader	EMPLOYMENT TERM Permanent / Full time

PURPOSE

- To provide advice, service, management, and general insurance assistance to domestic clients
- To retain and grow clients insurance portfolios
- To generate revenue by matching client requirements to insurer terms

KEY RELATIONSHIPS

INTERNAL	EXTERNAL
<ul style="list-style-type: none"> ▪ Team Leader ▪ National Domestic Manager ▪ Rothbury Tauranga Team ▪ Leader – Business Development & Sales 	<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"> ▪ Ensure all renewals, new business, alterations & cancellations are processed in an efficient and accurate manner ▪ Deliver prompt service to meet clients' ever changing expectations ▪ To actively work to maintain market awareness and develop insurance knowledge through continuing education to be able to recommend appropriate solutions including insurance covers ▪ Liaise with insurers on domestic insurance matters ▪ Plan workload to factor in key renewal times and peak periods
Reviewing For existing client portfolios	<ul style="list-style-type: none"> ▪ To review clients on an annual basis and record findings ▪ Check the correct type of domestic cover and level of cover for the client and amend as appropriate ▪ To place cover on time including renewal of client portfolios in accordance with required standards
Remarket For existing client portfolios	<ul style="list-style-type: none"> ▪ To remarket clients' portfolios or selected components at renewal as required ▪ To prepare complete insurers submissions in order to obtain the best terms available, fully manage the process and present the findings in writing to the client
New Business Development	<ul style="list-style-type: none"> ▪ To develop new clients through effective use of networks and own research.

RESPONSIBILITY	KEY DUTIES AND EXPECTED OUTCOMES
Other Responsibilities	<ul style="list-style-type: none"> ▪ Manage a client's portfolio and up sell where possible ▪ Process finance agreements in funding system for policies that are paid monthly ▪ Ensure premiums are collected within the required timeframe, in accordance with the Broker's Manual ▪ Work in well with team, claims and accounts personnel ▪ 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 ▪ Ensure that achievement of client service is measured through 'client questionnaire' and other survey measures as appropriate ▪ Actively contribute to the direction of Rothbury and support the strategic direction and any new initiatives ▪ Achieve annual/monthly performance targets. Targets are set, and regularly reviewed, in conjunction with the Branch Manager ▪ Meet reporting requirements on time and in requested format ▪ Refer leads to commercial broking

KEY PERFORMANCE INDICATORS

<ul style="list-style-type: none"> ▪ Successful servicing and retention of existing portfolio ▪ Achievement of portfolio growth through existing clients and new business development ▪ Achievement of set targets ▪ 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 ▪ 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
<ul style="list-style-type: none"> ▪ Level 5 National Qualification (or working towards) ▪ PIB (Professional Insurance Broker) recognised ▪ Understanding of the Insurance Industry
SKILLS AND ATTRIBUTES
<ul style="list-style-type: none"> ▪ 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) ▪ Commitment to invest in personal development

SUGGESTED TRAINING COURSES

GENERAL INSURANCE
<ul style="list-style-type: none">▪ 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
<ul style="list-style-type: none">▪ Domestic Policy Training (In house with Insurers)
SALES
<ul style="list-style-type: none">▪ Selling over the Phone▪ Building Relationships▪ Sales Strategies / Techniques
PROFESSIONAL DEVELOPMENT
<ul style="list-style-type: none">▪ Complaints Management & Disputes Resolution▪ Coaching & Mentoring▪ Time Management▪ Rothbury Foundation Programme
OTHER
<ul style="list-style-type: none">▪ 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**