Financial and Insurance Services Industry

New Zealand

Position descriptions | September 2023

Position Families:

Position Family: Actuarial

Chief Actuary - Multi-Focus	
Chief Actuary Multi-Focus	FININS.AS.CAMF.7
Multi-Area - Commercial Lines	
Principal Actuary – Multi-Area Commercial Lines	FININS.AS.MACL.6
Senior Actuary – Multi-Area Commercial Lines	FININS.AS.MACL.5
Actuary – Multi-Area Commercial Lines	FININS.AS.MACL.4
Actuarial Analyst - Multi-Area Commercial Lines	FININS.AS.MACL.3
Multi-Area - Personal Lines	
Principal Actuary – Multi-Area Personal Lines	FININS.AS.MAPL.6
Senior Actuary – Multi-Area Personal Lines	FININS.AS.MAPL.5
Actuary – Multi-Area Personal Lines	FININS.AS.MAPL.4
Actuarial Analyst – Multi-Area Personal Lines	FININS.AS.MAPL.3
Multi-Area - Group Life	
Principal Actuary – Multi-Area Group Life	FININS.AS.MACO.6
Senior Actuary – Multi-Area Group Life	FININS.AS.MACO.5
Actuary – Multi-Area Group Life	FININS.AS.MACO.4
Actuarial Analyst Group Life	FININS.AS.MACO.3
Multi-Area - Individual Life	
Principal Actuary – Multi-Area Individual Life	FININS.AS.MALF.6
Senior Actuary – Multi-Area Individual Life	FININS.AS.MALF.5
Actuary – Multi-Area Individual Life	FININS.AS.MALF.4
Actuarial Analyst – Multi-Area Individual Life	FININS.AS.MALF.3
Multi-area - Multi-focus	
Principal Actuary – Multi-Area Multi-focus	FININS.AS.MAMF.6
Senior Actuary – Multi-Area Multi-focus	FININS.AS.MAMF.5
Actuary – Multi-Area Multi-focus	FININS.AS.MAMF.4
Actuarial Analyst – Multi-Area Multi-focus	FININS.AS.MAMF.3
Actuarial Student – Multi-Area Multi-focus	FININS.AS.MAMF.2
Combined	
Multi-Area - Combined - Level 6	FININS.AS.MA00.6
Multi-Area - Combined - Level 5	FININS.AS.MA00.5
Multi-Area - Combined - Level 4	FININS.AS.MA00.4
Multi-Area - Combined - Level 3	FININS.AS.MA00.3
Multi-Area - Combined - Level 2	FININS.AS.MA00.2
Reserving/Valuation - Combined - Level 6	FININS.AS.RE00.6
Reserving/Valuation - Combined - Level 5	FININS.AS.RE00.5
Reserving/Valuation - Combined - Level 4	FININS.AS.RE00.4
Reserving/Valuation - Combined - Level 3	FININS.AS.RE00.3
Pricing - Combined - Level 6	FININS.AS.PR00.6
Pricing - Combined - Level 5	FININS.AS.PR00.5
Pricing - Combined - Level 4	FININS.AS.PR00.4
Pricing - Combined - Level 3	FININS.AS.PR00.3

*** Continued on Next Page ***

Position Family: Actuarial

Reserving/Valuation - Commercial Lines	
Principal Actuary – Reserving/Valuation Commercial Lines	FININS.AS.RECL.6
Senior Actuary – Reserving/Valuation Commercial Lines	FININS.AS.RECL.5
Actuary – Reserving/Valuation Commercial Lines	FININS.AS.RECL.4
Actuarial Analyst – Reserving/Valuation Commercial Lines	FININS.AS.RECL.3
Reserving/Valuation - Personal Lines	
Principal Actuary – Reserving/Valuation Personal Lines	FININS.AS.REPL.6
Senior Actuary – Reserving/Valuation Personal Lines	FININS.AS.REPL.5
Actuary – Reserving/Valuation Personal Lines	FININS.AS.REPL.4
Actuarial Analyst - Reserving/Valuation Personal Lines	FININS.AS.REPL.3
Reserving/Valuation - Group Life	
Principal Actuary – Reserving/Valuation Group Life	FININS.AS.RECO.6
Senior Actuary – Reserving/Valuation Group Life	FININS.AS.RECO.5
Actuary – Reserving/Valuation Group Life	FININS.AS.RECO.4
Actuarial Analyst – Reserving/Valuation Group Life	FININS.AS.RECO.3
Reserving/Valuation - Individual Life	
Principal Actuary – Reserving/Valuation Individual Life	FININS.AS.RELF.6
Senior Actuary – Reserving/Valuation Individual Life	FININS.AS.RELF.5
Actuary – Reserving/Valuation Individual Life	FININS.AS.RELF.4
Actuarial Analyst – Reserving/Valuation Individual Life	FININS.AS.RELF.3
Reserving/Valuation - Multi-focus	
Principal Actuary – Valuation/PricingReserving/Valuation Multi-focus	FININS.AS.REMF.6
Senior Actuary –Reserving/Valuation Multi-focus	FININS.AS.REMF.5
Actuary – Reserving/Valuation Multi-focus	FININS.AS.REMF.4
Actuarial Analyst – Reserving/Valuation Multi-focus	FININS.AS.REMF.3
Pricing - Commercial Lines	
Principal Actuary – Pricing Commercial Lines	FININS.AS.PRCL.6
Senior Actuary – Pricing Commercial Lines	FININS.AS.PRCL.5
Actuary – Pricing Commercial Lines	FININS.AS.PRCL.4
Actuarial Analyst – Pricing Commercial Lines	FININS.AS.PRCL.3
Pricing - Personal Lines	
Principal Actuary – Pricing Personal Lines	FININS.AS.PRPL.6
Senior Actuary – Pricing Personal Lines	FININS.AS.PRPL.5
Actuary – Pricing Personal Lines	FININS.AS.PRPL.4
Actuarial Analyst – Pricing Personal Lines	FININS.AS.PRPL.3
Pricing - Group Life	
Principal Actuary – Pricing Group Life	FININS.AS.PRCO.6
Senior Actuary – Pricing Group Life	FININS.AS.PRCO.5
Actuary – Pricing Group Life	FININS.AS.PRCO.4
Actuarial Analyst – Pricing Group Life	FININS.AS.PRCO.3

*** Continued on Next Page ***

Position Family: Actuarial

Pricing - Individual Life

Principal Actuary – Pricing Individual Life	FININS.AS.PRLF.6
Senior Actuary – Pricing Individual Life	FININS.AS.PRLF.5
Actuary – Pricing Individual Life	FININS.AS.PRLF.4
Actuarial Analyst – Pricing Individual Life	FININS.AS.PRLF.3

Pricing - Multi-focus

Principal Actuary – Pricing Multi-focus	FININS.AS.PRMF.6
Senior Actuary – Pricing Multi-focus	FININS.AS.PRMF.5
Actuary – Pricing Multi-focus	FININS.AS.PRMF.4
Actuarial Analyst – Pricing Multi-focus	FININS.AS.PRMF.3

Position Family: Analytics, Modelling & Reporting

Multi-area - Multi-focus	
Head of Data Analytics	FINFIN.AB.MAMF.7
Senior Manager Data Analytics	FINFIN.AB.MAMF.6
Manager Data Analytics	FINFIN.AB.MAMF.5
Senior Data Analyst	FINFIN.AB.MAMF.4
Data Analyst	FINFIN.AB.MAMF.3
Predictive Analytics - Multi-focus	
Senior Manager Predictive Analytics	FINFIN.AB.PAMF.6
Manager Predictive Analytics	FINFIN.AB.PAMF.5
Senior Analyst - Predictive Analytics	FINFIN.AB.PAMF.4
Analyst - Predictive Analytics	FINFIN.AB.PAMF.3
Head of Catastrophe Modelling - Multi-focus	
Head of Catastrophe Modelling	FININS.AB.HCMF.7
Catastrophe Modelling - Multi-focus	
Senior Manager - Catastrophe Modelling	FININS.AB.CMMF.6
Manager - Catastrophe Modelling	FININS.AB.CMMF.5
Senior Analytst - Catastrophe Modelling	FININS.AB.CMMF.4
Analyst - Catastrophe Modelling	FININS.AB.CMMF.3

Position Family: Brokerage - Carrier Placements

Head of Carrier Placements - Commercial Lines	
Head of Carrier Placements Commercial Lines	FININS.CI.HCCL.7
Multi-Area - Commercial Lines	
Placement Director Commercial Lines	FININS.CI.MACL.6
Placement Manager Commercial Lines	FININS.CI.MACL.5
Placement Executive Commercial Lines	FININS.CI.MACL.3
Head of Carrier Placements - Personal Lines	
Head of Carrier Placements Personal Lines	FININS.CI.HCPL.7
Multi-Area - Personal Lines	
Placement Director Personal Lines	FININS.CI.MAPL.6
Placement Manager Personal Lines	FININS.CI.MAPL.5
Placement Executive Personal Lines	FININS.CI.MAPL.3
Head of Carrier Placements - Employee Benefits	
Head of Carrier Placements Employee Benefits	FININS.CI.HCEB.7
Multi-Area - Employee Benefits	
Placement Director Employee Benefits	FININS.CI.MAEB.6
Placement Manager Employee Benefits	FININS.CI.MAEB.5
Placement Executive Employee Benefits	FININS.CI.MAEB.3
Head of Carrier Placements - Multi-Focus	
Head of Carrier Placements Multi-Focus	FININS.CI.HCMF.7
Multi-area - Multi-focus	
Placement Director Multi-Focus	FININS.CI.MAMF.6
Placement Manager Multi-Focus	FININS.CI.MAMF.5
Placement Executive Multi-Focus	FININS.CI.MAMF.3
Combined	
Head of Carrier Placements - Combined - Level 7	FININS.CI.HC00.7
Multi-Area - Combined - Level 6	FININS.CI.MA00.6
Multi-Area - Combined - Level 5	FININS.CI.MA00.5
Multi-Area - Combined - Level 3	FININS.CI.MA00.3

Position Family: Brokerage - Client Service and Reporting

Head of Client Services - Multi-Focus	
Head of Client Service Multi-Focus	FININS.CR.HAMF.7
Account Management / Customer Service - Commercial Lines	
Client Service Manager Commercial Lines	FININS.CR.AMCL.5
Client Service Executive Commercial Lines	FININS.CR.AMCL.3
Account Management / Customer Service - Personal Lines	
Client Service Manager Personal Lines	FININS.CR.AMPL.5
Client Service Executive Personal Lines	FININS.CR.AMPL.3
Account Management / Customer Service - Employee Benefits	
Client Service Manager Employee Benefits	FININS.CR.AMEB.5
Client Service Executive Employee Benefits	FININS.CR.AMEB.3
Account Management / Customer Service - Multi-Focus	
Client Service Manager Multi-Focus	FININS.CR.AMMF.5
Client Service Executive Multi-Focus	FININS.CR.AMMF.3
Combined	
Account Management / Customer Service - Combined - Level 5	FININS.CR.AM00.5
Account Management / Customer Service - Combined - Level 3	FININS.CR.AM00.3

Position Family: Brokerage - National Practice Group

National Practice Leader - Multi-Focus

National Practice Leader Multi-Focus FININS.NP.NPMF.7

Regional Practice Leader - Multi-Focus

Regional Practice Leader Multi-Focus FININS.NP.RPMF.6

Technical Expert - Multi-Focus

Technical Expert Multi-Focus FININS.NP.TEMF.4

Position Family: Brokerage - Relationship Management

Account Executive - Commercial Lines	
Head of Account Commercial Lines	FININS.RM.AECL.7
Account Executive - Commercial - Large Accounts	
Account Director Commercial - Large Accounts	FININS.RM.AECR.6
Account Manager Commercial - Large Accounts	FININS.RM.AECR.5
Senior Account Executive Commercial - Large Accounts	FININS.RM.AECR.4
Account Executive Commercial - Large Accounts	FININS.RM.AECR.3
Associate Account Executive Commercial - Large Accounts	FININS.RM.AECR.2
Account Executive - Commercial - Mid-sized Accounts	
Account Director Commercial - Mid-sized Accounts	FININS.RM.AECM.6
Account Manager Commercial - Mid-sized Accounts	FININS.RM.AECM.5
Senior Account Executive Commercial - Mid-sized Accounts	FININS.RM.AECM.4
Account Executive Commercial - Mid-sized Accounts	FININS.RM.AECM.3
Associate Account Executive Commercial - Mid-sized Accounts	FININS.RM.AECM.2
Account Executive - Commercial - Small Accounts	
Account Director Commercial - Small Accounts	FININS.RM.AECS.6
Account Manager Commercial - Small Accounts	FININS.RM.AECS.5
Senior Account Executive Commercial - Small Accounts	FININS.RM.AECS.4
Account Executive Commercial - Small Accounts	FININS.RM.AECS.3
Associate Account Executive Commercial - Small Accounts	FININS.RM.AECS.2
Account Executive - Employee Benefits	
Head of Account Employee Benefits	FININS.RM.AEEB.7
Account Executive - Employee Benefits - Large Accounts	
Account Director Employee Benefits - Large Accounts	FININS.RM.AEEL.6
Account Manager Employee Benefits - Large Accounts	FININS.RM.AEEL.5
Senior Account Executive Employee Benefits - Large Accounts	FININS.RM.AEEL.4
Account Executive Employee Benefits - Large Accounts	FININS.RM.AEEL.3
Associate Account Executive Employee Benefits - Large Accounts	FININS.RM.AEEL.2
Account Executive - Employee Benefits - Mid-sized Accounts	
Account Director Employee Benefits - Mid-sized Accounts	FININS.RM.AEEM.6
Account Manager Employee Benefits - Mid-sized Accounts	FININS.RM.AEEM.5
Senior Account Executive Employee Benefits - Mid-sized Accounts	FININS.RM.AEEM.4
Account Executive Employee Benefits - Mid-sized Accounts	FININS.RM.AEEM.3
Associate Account Executive Employee Benefits - Mid-sized Accounts	FININS.RM.AEEM.2
Account Executive - Employee Benefits - Small Accounts	
Account Director Employee Benefits - Small Accounts	FININS.RM.AEES.6
Account Manager Employee Benefits - Small Accounts	FININS.RM.AEES.5
Senior Account Executive Employee Benefits - Small Accounts	FININS.RM.AEES.4
Account Executive Employee Benefits - Small Accounts	FININS.RM.AEES.3
Associate Account Executive Employee Benefits - Small Accounts	FININS.RM.AEES.2

*** Continued on Next Page ***

Position Family: Brokerage - Relationship Management

Account Executive - Personal Lines

Head of Account Personal Lines	FININS.RM.AEPL.7
Account Director Personal Lines	FININS.RM.AEPL.6
Account Manager Personal Lines	FININS.RM.AEPL.5
Senior Account Executive Personal Lines	FININS.RM.AEPL.4
Account Executive Personal Lines	FININS.RM.AEPL.3
Associate Account Executive Personal Lines	FININS.RM.AEPL.2

Account Executive - Multi-Focus

Head of Account Multi-Focus	FININS.RM.AEMF.7
Account Director Multi-Focus	FININS.RM.AEMF.6
Account Manager Multi-Focus	FININS.RM.AEMF.5
Senior Account Executive Multi-Focus	FININS.RM.AEMF.4
Account Executive Multi-Focus	FININS.RM.AEMF.3
Associate Account Executive Multi-Focus	FININS.RM.AEMF.2

Combined

Account Executive - Combined - Level 7	FININS.RM.AE00.7
Account Executive - Combined - Level 6	FININS.RM.AE00.6
Account Executive - Combined - Level 5	FININS.RM.AE00.5
Account Executive - Combined - Level 4	FININS.RM.AE00.4
Account Executive - Combined - Level 3	FININS.RM.AE00.3
Account Executive - Combined - Level 2	FININS.RM.AE00.2

Position Family: Brokerage - Sales

Sales / Producer Sales Manager - Commercial - Large Accounts	
Regional Head Commercial - Large Accounts	FININS.SA.PSCL.7
Branch Manager Commercial - Large Accounts	FININS.SA.PSCL.6
Sales / Validated Producer - Commercial - Large Accounts	
Producer Sales Manager Commercial - Large Accounts	FININS.SA.VPCL.5
Senior Broker Commercial - Large Accounts	FININS.SA.VPCL.4
Producer/Broker Commercial - Large Accounts	FININS.SA.VPCL.3
Associate Broker Commercial - Large Accounts	FININS.SA.VPCL.2
Sales / Producer Sales Manager - Commercial - Mid-sized Accounts	
Regional Head - Commercial Mid-Sized Accounts	FININS.SA.PSCM.7
Branch Manager - Commercial Mid-Sized Accounts	FININS.SA.PSCM.6
Sales / Validated Producer - Commercial - Mid-Sized Accounts	
Producer Sales Manager Commercial - Mid-Sized Accounts	FININS.SA.VPCM.5
Senior Broker Commercial - Mid-Sized Accounts	FININS.SA.VPCM.4
Producer/Broker Commercial - Mid-Sized Accounts	FININS.SA.VPCM.3
Associate Broker Commercial - Mid-Sized Accounts	FININS.SA.VPCM.2
Sales / Producer Sales Manager - Commercial - Small Accounts	
Regional Head - Commercial Small Accounts	FININS.SA.PSCS.7
Branch Manager - Commercial Small Accounts	FININS.SA.PSCS.6
Sales / Validated Producer - Commercial - Small Accounts	
Producer Sales Manager Commercial - Small Accounts	FININS.SA.VPCS.5
Senior Broker Commercial - Small Accounts	FININS.SA.VPCS.4
Producer/Broker Commercial - Small Accounts	FININS.SA.VPCS.3
Associate Broker Commercial - Small Accounts	FININS.SA.VPCS.2
Sales / Producer Sales Manager - Employee Benefits - Large Accounts	
Regional Head Employee Benefits - Large Accounts	FININS.SA.PSEL.7
Branch Manager Employee Benefits - Large Accounts	FININS.SA.PSEL.6
Sales / Validated Producer - Employee Benefits - Large Accounts	
Producer Sales Manager Employee Benefits - Large Accounts	FININS.SA.VPEL.5
Senior Broker Employee Benefits - Large Accounts	FININS.SA.VPEL.4
Producer/Broker Employee Benefits - Large Accounts	FININS.SA.VPEL.3
Associate Broker Employee Benefits - Large Accounts	FININS.SA.VPEL.2
Sales / Producer Sales Manager - Employee Benefits - Mid-sized Accounts	
Regional Head - Employee Benefits - Mid-Sized Accounts	FININS.SA.PSEM.7
Branch Manager - Employee Benefits Mid-Sized Accounts	FININS.SA.PSEM.6
Sales / Validated Producer - Employee Benefits - Mid-sized Accounts	
Producer Sales Manager Employee Benefits - Mid-sized Accounts	FININS.SA.VPEM.5
Senior Broker Employee Benefits - Mid-sized Accounts	FININS.SA.VPEM.4
Producer/Broker Employee Benefits - Mid-sized Accounts	FININS.SA.VPEM.3
Associate Broker Employee Benefits - Mid-sized Accounts	FININS.SA.VPEM.2

*** Continued on Next Page ***

Position Family: Brokerage - Sales

Sales / Producer Sales Manager - Employee Benefits - Small Accounts	
Regional Head - Employee Benefits - Small Accounts	FININS.SA.PSES.7
Branch Manager - Employee Benefits Small Accounts	FININS.SA.PSES.6
Sales / Validated Producer - Employee Benefits - Small Accounts	
Producer Sales Manager Employee Benefits - Small Accounts	FININS.SA.VPES.5
Senior Broker Employee Benefits - Small Accounts	FININS.SA.VPES.4
Producer/Broker Employee Benefits - Small Accounts	FININS.SA.VPES.3
Associate Broker Employee Benefits - Small Accounts	FININS.SA.VPES.2
Sales / Producer Sales Manager - Personal Lines	
Regional Head - Personal Lines	FININS.SA.PSPL.7
Branch Manager - Personal Lines	FININS.SA.PSPL.6
Sales / Validated Producer - Personal Lines	
Producer Sales Manager Personal Lines	FININS.SA.VPPL.5
Senior Broker Personal Lines	FININS.SA.VPPL.4
Producer/Broker Personal Lines	FININS.SA.VPPL.3
Associate Broker Personal Lines	FININS.SA.VPPL.2
Sales / Producer Sales Manager - Multi-Focus	
Regional Head - Multi-Focus	FININS.SA.PSMF.7
Branch Manager Multi-focus	FININS.SA.PSMF.6
Sales / Validated Producer - Multi-Focus	
Producer Sales Manager Multi-Focus	FININS.SA.VPMF.5
Senior Broker Multi-Focus	FININS.SA.VPMF.4
Producer/Broker Multi-Focus	FININS.SA.VPMF.3
Associate Broker Multi-Focus	FININS.SA.VPMF.2
Combined	
Sales / Producer Sales Manager - Combined - Level 7	FININS.SA.PS00.7
Sales / Producer Sales Manager - Combined - Level 6	FININS.SA.PS00.6
Sales / Validated Producer - Combined - Level 5	FININS.SA.VP00.5
Sales / Validated Producer - Combined - Level 4	FININS.SA.VP00.4
Sales / Validated Producer - Combined - Level 3	FININS.SA.VP00.3
Sales / Validated Producer - Combined - Level 2	FININS.SA.VP00.2

Position Family: Business, Commercial & Corporate Banking - Relationship Management

Multi-area - Multi-focus	
Head of Business, Commercial & Corporate Banking	FINCCB.RM.MAMF.7
Regional Manager - Business, Commercial & Corporate Banking	FINCCB.RM.MAMF.6
Head of Business Banking - Multi-focus	
Head of Business Banking	FINCCB.LE.BYMF.7
Business Banking - Multi-focus	
Regional Manager - Business	FINCCB.RM.BBMF.6
Senior Banker - Business	FINCCB.RM.BBMF.5
Banker - Business	FINCCB.RM.BBMF.4
Senior Associate - Business	FINCCB.RM.BBMF.3
Analyst - Business	FINCCB.RM.BBMF.2
Head of Corporate Banking - Multi-focus	
Head of Corporate Banking	FINCCB.LE.CSMF.7
Corporate Banking - Multi-focus	
Regional Manager - Corporate	FINCCB.RM.CBMF.6
Senior Banker - Corporate	FINCCB.RM.CBMF.5
Banker - Corporate	FINCCB.RM.CBMF.4
Senior Associate - Corporate	FINCCB.RM.CBMF.3
Analyst - Corporate	FINCCB.RM.CBMF.2
Equipment Leasing & Finance - Multi-focus	
Manager - Property/Equipment/Asset Finance	FINCCB.RM.ELMF.5
Banker/Business Development Manager - Property/Equipment/Asset Finance	FINCCB.RM.ELMF.4
Account Manager - Property/Equipment/Asset Finance	FINCCB.RM.ELMF.3
Analyst - Property/Equipment/Asset Finance	FINCCB.RM.ELMF.2
Middle Market Corporate Banking - Agricultural Financing	
Senior Banker - Agribusiness	FINCCB.RM.MCAG.5
Banker - Agribusiness	FINCCB.RM.MCAG.4
Senior Associate - Agribusiness	FINCCB.RM.MCAG.3
Analyst - Agribusiness	FINCCB.RM.MCAG.2
Head of Middle Market Corporate Banking - Multi-focus	
Head of Commercial Banking	FINCCB.LE.ERMF.7
Middle Market Corporate Banking - Multi-focus	
Regional Manager - Commercial	FINCCB.RM.MCMF.6
Senior Banker - Commercial	FINCCB.RM.MCMF.5
Banker - Commercial	FINCCB.RM.MCMF.4
Senior Associate - Commercial	FINCCB.RM.MCMF.3
Analyst - Commercial	FINCCB.RM.MCMF.2
Head of Transaction Banking - Multi-focus	
Head of Transaction Banking	FINCCB.LE.HSMF.7
Transaction Banking - Multi-focus	
Regional Manager - Transaction Banking	FINCCB.RM.TBMF.6
Senior Banker - Transaction Banking	FINCCB.RM.TBMF.5
Banker - Transaction Banking	FINCCB.RM.TBMF.4

*** Continued on Next Page ***

Position Family: Business, Commercial & Corporate Banking - Relationship Management

Senior Associate - Transaction Banking	FINCCB.RM.TBMF.3
Analyst - Transaction Banking	FINCCB.RM.TBMF.2

Position Family: Investment Banking - Relationship Management

Head of Investment Banking - Multi-focus	
Head of Investment Banking	FINIBD.LE.EJMF.7
Industry Coverage - Cross-Industry / Regional & Country Coverage	
Director	FINIBD.RM.ICCC.6
Associate Director	FINIBD.RM.ICCC.5
Relationship Manager	FINIBD.RM.ICCC.4
Associate	FINIBD.RM.ICCC.3
Analyst	FINIBD.RM.ICCC.2

Position Family: Claims

Assessing Manager - Multi-focus	
National Assessing Manager Multi-focus	FININS.CL.AMMF.6
Assessing Manager Multi-focus	FININS.CL.AMMF.5
Assessor - Personal Lines	
Senior Home Assessor - Personal Lines	FININS.CL.ASPL.4
Home Assessor - Personal Lines	FININS.CL.ASPL.3
Motor Vehicle Assessor - Commercial Lines	
Senior Motor Vehicle Assessor - Commercial Lines	FININS.CL.MVCL.4
Motor Vehicle Assessor - Commercial Lines	FININS.CL.MVCL.3
Motor Vehicle Assessor - Personal Lines	
Senior Motor Vehicle Assessor - Personal Lines	FININS.CL.MVPL.4
Motor Vehicle Assessor - Personal Lines	FININS.CL.MVPL.3
Combined	
Motor Vehicle Assessor - Combined - Level 3	FININS.CL.MV00.3
Motor Vehicle Assessor - Combined - Level 4	FININS.CL.MV00.4
Claims Specialist / Processing - Combined - Level 6	FININS.CL.CL00.6
Claims Specialist / Processing - Combined - Level 5	FININS.CL.CL00.5
Claims Specialist / Processing - Combined - Level 4	FININS.CL.CL00.4
Claims Specialist / Processing - Combined - Level 3	FININS.CL.CL00.3
Claims Specialist / Processing - Combined - Level 2	FININS.CL.CL00.2
Claims Specialist / Processing - Combined - Level 1	FININS.CL.CL00.1
Chief Claims Officer - Multi-focus	
Chief Claims Officer	FININS.CL.CIMF.7
Claims Specialist / Processing - Commercial Liability	
National Claims Manager Commercial Liability	FININS.CL.CLGL.6
Region/Branch Claims Manager Commercial Liability	FININS.CL.CLGL.5
Claims Supervisor/Team Leader Commercial Liability	FININS.CL.CLGL.4
Senior Claims Consultant - Commercial Liability	FININS.CL.CLGL.3
Claims Consultant - Commercial Liability	FININS.CL.CLGL.2
Claims Specialist / Processing - Commercial Motor	
National Claims Manager Commercial Motor	FININS.CL.CLMO.6
Region/Branch Claims Manager Commercial Motor	FININS.CL.CLMO.5
Claims Supervisor/Team Leader Commercial Motor	FININS.CL.CLMO.4
Senior Claims Consultant - Commercial Motor	FININS.CL.CLMO.3
Claims Consultant - Commercial Motor	FININS.CL.CLMO.2
Claims Specialist / Processing - Commercial Property	
National Claims Manager Commercial Property	FININS.CL.CLPR.6
Region/Branch Claims Manager Commercial Property	FININS.CL.CLPR.5
Claims Supervisor/Team Leader Commercial Property	FININS.CL.CLPR.4
Senior Claims Consultant - Commercial Property	FININS.CL.CLPR.3
Claims Consultant - Commercial Property	FININS.CL.CLPR.2

*** Continued on Next Page ***

Position Family: Claims

Claims Specialist / Processing - Specialties - Marine	
National Claims Manager Commercial Marine	FININS.CL.CLMA.6
Region/Branch Claims Manager Commercial Marine	FININS.CL.CLMA.5
Claims Supervisor/Team Leader Commercial Marine	FININS.CL.CLMA.4
Senior Claims Consultant - Commercial Marine	FININS.CL.CLMA.3
Claims Consultant - Commercial Marine	FININS.CL.CLMA.2
Claims Specialist / Processing - Specialties - Other	
National Claims Manager Specialties - Other	FININS.CL.CLSL.6
Region/Branch Claims Manager Specialties - Other	FININS.CL.CLSL.5
Claims Supervisor/Team Leader Specialties - Other	FININS.CL.CLSL.4
Senior Claims Consultant Specialties - Other	FININS.CL.CLSL.3
Claims Consultant Specialties - Other	FININS.CL.CLSL.2
Claims Specialist / Processing - Specialties - Rural	
National Claims Manager Rural	FININS.CL.CLCR.6
Region/Branch Claims Manager Rural	FININS.CL.CLCR.5
Claims Supervisor/Team Leader Rural	FININS.CL.CLCR.4
Senior Claims Consultant - Rural	FININS.CL.CLCR.3
Claims Consultant - Rural	FININS.CL.CLCR.2
Claims Specialist / Processing - Personal Lines	
National Claims Manager Personal Lines	FININS.CL.CLPL.6
Region/Branch Claims Manager Personal Lines	FININS.CL.CLPL.5
Claims Supervisor/Team Leader Personal Lines	FININS.CL.CLPL.4
Senior Claims Consultant - Personal Lines	FININS.CL.CLPL.3
Claims Consultant - Personal Lines	FININS.CL.CLPL.2
Claims Specialist / Processing - Accident & Health	
National Claims Manager Accident & Health	FININS.CL.CLAH.6
Region/Branch Claims Manager Accident & Health	FININS.CL.CLAH.5
Claims Supervisor/Team Leader Accident & Health	FININS.CL.CLAH.4
Senior Claims Consultant Accident & Health	FININS.CL.CLAH.3
Claims Consultant Accident & Health	FININS.CL.CLAH.2
Claims Specialist / Processing - Life	
National Claims Manager Life	FININS.CL.CLLA.6
Region/Branch Claims Manager Life	FININS.CL.CLLA.5
Claims Supervisor/Team Leader Life	FININS.CL.CLLA.4
Senior Claims Consultant Life	FININS.CL.CLLA.3
Claims Consultant Life	FININS.CL.CLLA.2
Claims Specialist / Processing - Disability	
National Claims Manager Disability	FININS.CL.CLDI.6
Region/Branch Claims Manager Disability	FININS.CL.CLDI.5
Claims Supervisor/Team Leader Disability	FININS.CL.CLDI.4
Senior Claims Consultant Disability	FININS.CL.CLDI.3
Claims Consultant Disability	FININS.CL.CLDI.2

*** Continued on Next Page ***

Position Family: Claims

Claims Specialist / Processing - Multi-focus	
National Claims Manager Multi-focus	FININS.CL.CLMF.6
Region/Branch Claims Manager Multi-focus	FININS.CL.CLMF.5
Claims Supervisor/Team Leader Multi-focus	FININS.CL.CLMF.4
Senior Claims Consultant - Multi-focus	FININS.CL.CLMF.3
Claims Consultant - Multi-focus	FININS.CL.CLMF.2
Claims Administrator	FININS.CL.CLMF.1
Insurance Fraud Management / Claims Investigation - Multi-Focus	
Claims/Fraud Investigation Manager Multi-Focus	FININS.CL.IFMF.5
Claims/Fraud Investigation Team Leader Multi-Focus	FININS.CL.IFMF.4
Claims/Fraud Investigator	FININS.CL.IFMF.3
Technical Claims - Multi-Focus	
Technical Claims Consultant	FININS.CL.TMMF.4
Technical Claims Manager	FININS.CL.TMMF.5
Claims Analysis / Quality - Multi-Focus	
Claims Quality Manager Multi-Focus	FININS.CL.CYMF.5
Claims Quality Team Leader Multi-Focus	FININS.CL.CYMF.4
Claims Quality Analyst Multi-Focus	FININS.CL.CYMF.3
Subrogation / Claims Recovery - Multi-focus	
Claims Recovery Manager	FININS.CL.SUMF.5
Claims Recovery Team Leader	FININS.CL.SUMF.4
Senior Claims Recovery Consultant	FININS.CL.SUMF.3
Claims Recovery Consultant	FININS.CL.SUMF.2

Position Family: Customer Service

Call Centre - Multi-focus

Contact Centre General Manager	FINFIN.CR.CCMF.6
Contact Centre Manager	FINFIN.CR.CCMF.5
Customer Service Team Leader/Senior Product Advisor	FINFIN.CR.CCMF.4
Product Advisor	FINFIN.CR.CCMF.3
Senior Customer Service Consultant	FINFIN.CR.CCMF.2
Customer Service Consultant	FINFIN.CR.CCMF.1

Position Family: Clinical Advisory

Clinical Advisory - Multi-Focus	
Chief Medical Officer Multi-Focus	FININS.DR.DRMF.7
Head of Clinical Advisory Multi-Focus	FININS.DR.DRMF.6
Senior Medical Advisor Multi-Focus	FININS.DR.DRMF.5
Medical Advisor Multi-Focus	FININS.DR.DRMF.4
Clinical Case Manager Multi-Focus	FININS.DR.DRMF.3
Clinical Coder Multi-Focus	FININS.DR.DRMF.2
Clinical Governance - Multi-Focus	
Head of Clinical Governance Multi-Focus	FININS.DR.CGMF.6
Clinical Governance Manager Multi-Focus	FININS.DR.CGMF.5
Clinical Governance Advisor Multi-Focus	FININS.DR.CGMF.4

Position Family: Compliance, AML & Control

Head of Compliance - Multi-focus	
Head of Compliance	FININF.CP.CCMF.6
Multi-area - Multi-focus	
Compliance Manager	FININF.CP.MAMF.5
Senior Compliance Officer	FININF.CP.MAMF.4
Compliance Officer	FININF.CP.MAMF.3

Position Family: Consumer Banking - Branch Delivery

Head of Retail Banking - Multi-focus	
General Manager/Head of Retail Banking	FINCNB.LE.FNMF.7
Branch Leadership - Regional Management	
Regional Manager - Retail Banking	FINCNB.BD.BLRM.6
Branch Sales - Branch Manager - Flagship / Large	
Branch Manager large (>12 staff)	FINCNB.BD.BSFL.5
Branch Sales - Branch Manager - Medium Branch / Small	
Branch Manager small/medium (<12 staff)	FINCNB.BD.BSMB.5
Branch Sales - Personal Banker	
Senior Personal Banker	FINCNB.BD.BSPE.4
Personal Banker	FINCNB.BD.BSPE.3
Branch Customer Service - Multi-Focus	
Team Leader - Retail Banking	FINCNB.BD.CSMF.4
Senior Customer Service Consultant	FINCNB.BD.CSMF.2
Customer Service Consultant	FINCNB.BD.CSMF.1
Combined	
Branch Sales - Combined - Level 5	FINCNB.BD.BS00.5
Branch Sales - Combined - Level 4	FINCNB.BD.BS00.4
Branch Sales - Combined - Level 3	FINCNB.BD.BS00.3

Position Family: Consumer Banking - Sales

Direct Sales - Consumer Lending	
Manager Mobile Lending	FINCNB.SA.DSCL.5
Senior Mobile Lender	FINCNB.SA.DSCL.4
Mobile Lender	FINCNB.SA.DSCL.3
Direct Sales - Mortgage Banking	
Manager Mortgage Broking	FINCNB.SA.DSMB.5
Senior Mortgage Broker	FINCNB.SA.DSMB.4
Mortgage Broker	FINCNB.SA.DSMB.3
Direct Sales - Premier Banking	
Regional Manager Private Banking	FINCNB.SA.DSPB.5
Senior Client Manager	FINCNB.SA.DSPB.4
Client Manager	FINCNB.SA.DSPB.3

Position Family: Consumer Banking - Operations

Loan Processing	
Manager - Lending Operations	FINCNB.CO.CBLP.5
Team Leader - Lending Operations	FINCNB.CO.CBLP.4
Senior Lending Officer - Lending Operations	FINCNB.CO.CBLP.3
Lending Officer	FINCNB.CO.CBLP.2
Processing & Transaction Support - Multi-Focus	
Manager - Processing & Transaction Support	FINCNB.CO.CBMF.5
Team Leader - Processing & Transaction Support	FINCNB.CO.CBMF.4
Senior Processing & Transaction Support Officer	FINCNB.CO.CBMF.3
Processing & Transaction Support Officer	FINCNB.CO.CBMF.2
Collections - Multi-focus	
Manager - Loss Recovery Operations	FINCNB.CS.COMF.5
Team Leader - Loss Recovery Operations	FINCNB.CS.COMF.4
Senior Loss Recovery Officer	FINCNB.CS.COMF.3
Loss Recovery Officer	FINCNB.CS.COMF.2
Combined	
Consumer Banking Operations - Combined - Level 5	FINCNB.CO.CB00.5
Consumer Banking Operations - Combined - Level 4	FINCNB.CO.CB00.4
Consumer Banking Operations - Combined - Level 3	FINCNB.CO.CB00.3
Consumer Banking Operations - Combined - Level 2	FINCNB.CO.CB00.2

Position Family: Fund Administration

Retirement Plan Services Operations - Plan Administration

Scheme Administration Manager / Operations Manager	FINASM.AO.RPPG.5
Scheme Administration Team Leader	FINASM.AO.RPPG.4
Senior Scheme Administrator	FINASM.AO.RPPG.3
Scheme Administrator level 3	FINASM.AO.RPPG.2
Scheme Administrator level 1 - 2	FINASM.AO.RPPG.1

Position Family: Fund Administration - Unit Pricing

Pension Fund Accounting - Multi-focus

Manager - Unit Pricing	FINASM.FU.PFMF.5
Senior Unit Pricing Analyst	FINASM.FU.PFMF.4
Unit Pricing Analyst	FINASM.FU.PFMF.3
Assistant Unit Pricing Analyst	FINASM.FU.PFMF.2

Position Family: Health Insurance - Provider Management

Provider Management - Accident & Health

Head of Provider Management	FININS.PV.PVAH.6
Manager Provider Management	FININS.PV.PVAH.5
Provider Management Team Leader	FININS.PV.PVAH.4
Provider Management Specialist	FININS.PV.PVAH.3
Provider Relations Coordinator	FININS.PV.PVAH.2

Position Family: Product Management / Development

Multi-Area - Commercial Lines	
Head of Product Commercial Lines	FININS.PR.MACL.6
Senior Product Manager Commercial LInes	FININS.PR.MACL.5
Product Manager Commercial Lines	FININS.PR.MACL.4
Associate Product Manager Commercial Lines	FININS.PR.MACL.3
Multi-Area - Personal Lines	
Head of Product Personal Lines	FININS.PR.MAPL.6
Senior Product Manager Personal Lines	FININS.PR.MAPL.5
Product Manager Personal Lines	FININS.PR.MAPL.4
Associate Product Manager Personal Lines	FININS.PR.MAPL.3
Multi-Area - General Multi-Focus	
Head of Product General Multi-Focus	FININS.PR.MAMF.6
Senior Product Manager General Multi-Focus	FININS.PR.MAMF.5
Product Manager General Multi-Focus	FININS.PR.MAMF.4
Associate Product Manager General Multi-Focus	FININS.PR.MAMF.3
Multi-Area - Group Life	
Head of Product Group Life	FININS.PR.MAGP.6
Senior Product Manager Group Life	FININS.PR.MAGP.5
Product Manager Group Life	FININS.PR.MAGP.4
Associate Product Manager Group Life	FININS.PR.MAGP.3
Multi-Area - Individual Life	
Head of Product Individual Life	FININS.PR.MAIP.6
Senior Product Manager Individual Life	FININS.PR.MAIP.5
Product Manager Individual Life	FININS.PR.MAIP.4
Associate Product Manager Individual Life	FININS.PR.MAIP.3
Multi-Area - Life Multi-focus	
Head of Product General Multi-Focus	FININS.PR.MALP.6
Senior Product Manager General Multi-Focus	FININS.PR.MALP.5
Product Manager General Multi-Focus	FININS.PR.MALP.4
Associate Product Manager General Multi-Focus	FININS.PR.MALP.3
Combined	
Multi-Area - Combined - Level 6	FININS.PR.MA00.6
Multi-Area - Combined - Level 5	FININS.PR.MA00.5
Multi-Area - Combined - Level 4	FININS.PR.MA00.4
Multi-Area - Combined - Level 3	FININS.PR.MA00.3

Position Family: Insurance Underwriting

Chief Underwriting Officer - Multi-Focus	
Chief Underwriter Multi-Focus	FININS.IU.CUMF.7
Underwriting - Commercial Liability	
National Underwriting Manager Commercial Liability	FININS.IU.UNGL.6
Underwriting Manager Commercial Liability	FININS.IU.UNGL.5
Senior Underwriter Commercial Liability	FININS.IU.UNGL.4
Underwriter Commercial Liability	FININS.IU.UNGL.3
Underwriting - Commercial Motor	
National Underwriting Manager Commercial Motor	FININS.IU.UNMO.6
Underwriting Manager Commercial Motor	FININS.IU.UNMO.5
Senior Underwriter Commercial Motor	FININS.IU.UNMO.4
Underwriter Commercial Motor	FININS.IU.UNMO.3
Underwriting - Commercial Property	
National Underwriting Manager Commercial Property	FININS.IU.UNPR.6
Underwriting Manager Commercial Property	FININS.IU.UNPR.5
Senior Underwriter Commercial Property	FININS.IU.UNPR.4
Underwriter Commercial Property	FININS.IU.UNPR.3
Underwriting - Specialties - Marine	
National Underwriting Manager Specialties - Marine	FININS.IU.UNMA.6
Underwriting Manager Specialties - Marine	FININS.IU.UNMA.5
Senior Underwriter Specialties - Marine	FININS.IU.UNMA.4
Underwriter Specialties - Marine	FININS.IU.UNMA.3
Underwriting - Specialties - Rural	
National Underwriting Manager Specialties - Rural	FININS.IU.UNCR.6
Underwriting Manager Specialties - Rural	FININS.IU.UNCR.5
Senior Underwriter Specialties - Rural	FININS.IU.UNCR.4
Underwriter Specialties - Rural	FININS.IU.UNCR.3
Underwriting - Specialties - Other	
National Underwriting Manager Specialties - Other	FININS.IU.UNSL.6
Underwriting Manager Specialties - Other	FININS.IU.UNSL.5
Senior Underwriter Specialties - Other	FININS.IU.UNSL.4
Underwriter Specialties - Other	FININS.IU.UNSL.3
Underwriting - Personal Lines	
National Underwriting Manager Personal Lines	FININS.IU.UNPL.6
Underwriting Manager Personal Lines	FININS.IU.UNPL.5
Senior Underwriter Personal Lines	FININS.IU.UNPL.4
Underwriter Personal Lines	FININS.IU.UNPL.3
Underwriting - Group Life	
National Underwriting Manager Group Life	FININS.IU.UNGP.6
Underwriting Manager Group Life	FININS.IU.UNGP.5
Underwriting Team Leader Group Life	FININS.IU.UNGP.4
Underwriter Group Life	FININS.IU.UNGP.3

*** Continued on Next Page ***

Position Family: Insurance Underwriting

Underwriting - Individual Life	
National Underwriting Manager Individual Life	FININS.IU.UNIP.6
Underwriting Manager Individual Life	FININS.IU.UNIP.5
Underwriting Team Leader Individual Life	FININS.IU.UNIP.4
Underwriter Individual Life	FININS.IU.UNIP.3
Underwriting - Multi-Focus	
National Underwriting Manager Multi-Focus	FININS.IU.UNMF.6
Underwriting Manager Multi-Focus	FININS.IU.UNMF.5
Senior Underwriter Multi-Focus	FININS.IU.UNMF.4
Underwriter Multi-Focus	FININS.IU.UNMF.3
Assistant Underwriter Multi-Focus	FININS.IU.UNMF.2
Combined	
Underwriting - Combined - Level 6	FININS.IU.UN00.6
Underwriting - Combined - Level 5	FININS.IU.UN00.5
Underwriting - Combined - Level 4	FININS.IU.UN00.4
Underwriting - Combined - Level 3	FININS.IU.UN00.3
Underwriting - Combined - Level 2	FININS.IU.UN00.2
Risk Engineering - Combined - Level 6	FININS.IU.RK00.6
Risk Engineering - Combined - Level 5	FININS.IU.RK00.5
Risk Engineering - Combined - Level 4	FININS.IU.RK00.4
Reinsurance Facultative - Multi-Focus	
National Reinsurance Underwriting Manager - Facultative	FININS.IU.FAMF.6
Reinsurance Underwriting Manager - Facultative	FININS.IU.FAMF.5
Reinsurance Underwriting Team Leader Multi-Focus	FININS.IU.FAMF.4
Reinsurance Underwriter - Facultative	FININS.IU.FAMF.3
Reinsurance Treaty - Multi-Focus	
National Reinsurance Underwriting Manager - Treaty	FININS.IU.TRMF.6
Reinsurance Underwriting Manager - Treaty	FININS.IU.TRMF.5
Reinsurance Underwriting Team Leader - Treaty	FININS.IU.TRMF.4
Reinsurance Underwriter - Treaty	FININS.IU.TRMF.3
Reinsurance Multi-Area - Multi-Focus	
National Reinsurance Underwriting Manager - Multi-Area	FININS.IU.MAMF.6
Reinsurance Underwriting Manager - Multi-Area	FININS.IU.MAMF.5
Reinsurance Underwriting Team Leader - Multi-Area	FININS.IU.MAMF.4
Reinsurance Underwriter - Multi-Area	FININS.IU.MAMF.3
Risk Engineering - Commercial Lines	
National Loss Control/Risk Engineering Manager Commercial Lines	FININS.IU.RKCL.6
Loss Control/Risk Engineering Manager Commercial Lines	FININS.IU.RKCL.5
Loss Control/Risk Engineer Commercial Lines	FININS.IU.RKCL.4
Risk Engineering - Personal Lines	
National Loss Control/Risk Engineering Manager Personal Lines	FININS.IU.RKPL.6
Loss Control/Risk Engineering Manager Personal Lines	FININS.IU.RKPL.5
Loss Control/Risk Engineer Personal Lines	FININS.IU.RKPL.4

*** Continued on Next Page ***

Position Family: Insurance Underwriting

Risk Engineering - Multi-focus

National Loss Control/Risk Engineering Manager Multi-focus	FININS.IU.RKMF.6
Loss Control/Risk Engineering Manager Multi-focus	FININS.IU.RKMF.5
Loss Control/Risk Engineer Multi-focus	FININS.IU.RKMF.4

Position Family: Investments - Portfolio Management

Real Estate - Multi-Focus	
Head of Portfolio - Real Estate	FINASM.PM.REMF.7
Senior Portfolio Manager - Real Estate	FINASM.PM.REMF.6
Portfolio Manager - Real Estate	FINASM.PM.REMF.5
Senior Analyst - Real Estate	FINASM.PM.REMF.4
Analyst - Real Estate	FINASM.PM.REMF.3
Investment Support - Real Estate	FINASM.PM.REMF.2
Equities - Multi-Focus	
Head of Portfolio - Equities	FINASM.PM.EQMF.7
Senior Portfolio Manager - Equities	FINASM.PM.EQMF.6
Portfolio Manager - Equities	FINASM.PM.EQMF.5
Senior Analyst - Equities	FINASM.PM.EQMF.4
Analyst - Equities	FINASM.PM.EQMF.3
Investment Support - Equities	FINASM.PM.EQMF.2
Fixed Income - Multi-Focus	
Head of Portfolio - Fixed Income	FINASM.PM.FIMF.7
Senior Portfolio Manager - Fixed Income	FINASM.PM.FIMF.6
Portfolio Manager - Fixed Income	FINASM.PM.FIMF.5
Senior Analyst - Fixed Income	FINASM.PM.FIMF.4
Analyst - Fixed Income	FINASM.PM.FIMF.3
Investment Support - Fixed Income	FINASM.PM.FIMF.2
Multi-Asset - Multi-Focus	
Head of Portfolio - Multi -Asset	FINASM.PM.MUMF.7
Senior Portfolio Manager - Multi-Asset	FINASM.PM.MUMF.6
Portfolio Manager - Multi-Asset	FINASM.PM.MUMF.5
Senior Analyst - Multi-Asset	FINASM.PM.MUMF.4
Analyst - Multi-Asset	FINASM.PM.MUMF.3
Investment Support - Multi-Asset	FINASM.PM.MUMF.2

Position Family: Investments - Research

Multi-Asset - Multi-Focus

Head of Research	FINASM.RE.MAMF.7
Senior Research Manager	FINASM.RE.MAMF.6
Research Manager	FINASM.RE.MAMF.5
Senior Research Analyst	FINASM.RE.MAMF.4
Research Analyst	FINASM.RE.MAMF.3

Position Family: Investments - Trading

Multi-Asset - Multi-Focus

Head of Trading - Multi-Asset	FINASM.TR.MAMF.7
Senior Manager Trading - Multi-Asset	FINASM.TR.MAMF.6
Manager Trading - Multi-Asset	FINASM.TR.MAMF.5
Senior Analyst Trading - Multi-Asset	FINASM.TR.MAMF.4
Trading Analyst - Multi-Asset	FINASM.TR.MAMF.3

Position Family: Leadership

Chief Executive Officer - Multi-focus	
Chief Executive Officer	FINFIN.LE.AIMF.8
Chief Executive Officer - Business Unit - Multi-focus	
GM Single Function	FINFIN.LE.AJMF.7
Chief Administration Officer - Business Unit - Multi-focus	
General Manager/Head of Operational or Support Function	FINFIN.LE.AEMF.7
Corporate Tax - Head of Corporate Tax	
General Manager/Head of Taxation	FININF.FI.CTHC.7
Chief Risk Officer - Multi-focus	
Chief Risk Officer	FINFIN.LE.RKCR.7

Position Family: Reinsurance - Ceded

Multi-area - Multi-focus

Reinsurance Manager	FININS.CX.MAMF.5
Reinsurance Analyst	FININS.CX.MAMF.3

Position Family: Reinsurance - Finance

Reinsurance Accounting - Multi-Focus

Reinsurance Accounting Manager Multi-Focus	FININS.FI.RAMF.5
Senior Reinsurance/Technical Accountant Multi-Focus	FININS.FI.RAMF.4
Reinsurance/Technical Accountant Multi-Focus	FININS.FI.RAMF.3
Reinsurance Administrator Multi-Focus	FININS.FI.RAMF.2

Position Family: Reinsurance - Retrocession

Multi-area - Multi-focus

Retrocession Manager	FININS.RI.MAMF.5
Retrocession Analyst	FININS.RI.MAMF.3

Position Family: Relationship Management

Group Sponsor Relationship Management - Multi-focus

Head of Group Sponsor Relationship Management	FINFIN.RM.GSMF.7
National Account Manager - Group Sponsor Relationship Management	FINFIN.RM.GSMF.6
Account Manager - Group Sponsor Relationship Management	FINFIN.RM.GSMF.5
Senior Account Executive - Group Sponsor Relationship Management	FINFIN.RM.GSMF.4
Account Executive - Group Sponsor Relationship Management	FINFIN.RM.GSMF.3
Assistant Account Executive - Group Sponsor Relationship Management	FINFIN.RM.GSMF.2

Intermediary Account Management - Multi-focus

Head of Intermediary Account Management	FINFIN.RM.IKMF.7
National Account Manager - Intermediaries	FINFIN.RM.IKMF.6
Account Manager - Intermediaries	FINFIN.RM.IKMF.5
Senior Account Executive - Intermediaries	FINFIN.RM.IKMF.4
Account Executive - Intermediaries	FINFIN.RM.IKMF.3
Assistant Account Executive - Intermediaries	FINFIN.RM.IKMF.2

Account Management - Multi-Area

Head of Account Management - Multi-Area	FINFIN.RM.RMMF.7
National Account Manager - Multi-Area	FINFIN.RM.RMMF.6
Account Manager - Multi-Area	FINFIN.RM.RMMF.5
Senior Account Executive - Multi-Area	FINFIN.RM.RMMF.4
Account Executive - Multi-Area	FINFIN.RM.RMMF.3
Assistant Account Executive - Multi-Area	FINFIN.RM.RMMF.2

Position Family: Risk Management

Credit Risk Management - Head of Credit Risk Management	
Head of Credit Risk	FININF.RK.CKHC.6
Credit Risk Management - Multi-focus	
Credit Risk Manager	FININF.RK.CKMF.5
Senior Risk Analyst - Lending & Credit Risk	FININF.RK.CKMF.4
Risk Analyst - Lending & Credit Risk	FININF.RK.CKMF.3
Enterprise Risk Management - Head of Enterprise Risk Management	
Head of Enterprise Risk	FININF.RK.ERHE.6
Enterprise Risk Management - Multi-focus	
Enterprise Risk Manager	FININF.RK.ERMF.5
Senior Risk Analyst - Enterprise Risk	FININF.RK.ERMF.4
Risk Analyst - Enterprise Risk	FININF.RK.ERMF.3
Market Risk Management - Head of Market Risk Management	
Head of Market Risk	FININF.RK.MFHM.6
Market Risk Management - Multi-focus	
Market Risk Manager	FININF.RK.MFMF.5
Senior Risk Analyst - Market Risk	FININF.RK.MFMF.4
Risk Analyst - Market Risk	FININF.RK.MFMF.3
Operational Risk Management - Head of Operational Risk Management	
Head of Operational Risk	FININF.RK.ORHO.6
Operational Risk Management - Multi-focus	
Operational Risk Manager	FININF.RK.ORMF.5
Senior Risk Analyst - Operational Risk	FININF.RK.ORMF.4
Risk Analyst - Operational Risk	FININF.RK.ORMF.3

Position Family: Sales

Multi-area - Multi-focus	
Head of Sales	FINFIN.SA.MAMF.7
Senior Sales/Business Development Manager	FINFIN.SA.MAMF.6
Sales/Business Development Manager	FINFIN.SA.MAMF.5
Senior Sales Representative/Business Development Specialist	FINFIN.SA.MAMF.4
Sales Representative/Business Development Associate	FINFIN.SA.MAMF.3
Direct Professional Sales - Multi-Focus	
Senior Sales Manager - Direct	FINFIN.SA.DPMF.6
Sales Manager - Direct	FINFIN.SA.DPMF.5
Senior Sales Representative - Direct	FINFIN.SA.DPMF.4
Sales Representative - Direct	FINFIN.SA.DPMF.3
Direct Response Sales - Multi-focus	
Telesales Representative	FINFIN.SA.DRMF.2
Group Sales - Multi-focus	
Senior Sales Manager - Group Sales	FINFIN.SA.GSMF.6
Sales Manager - Group Sales	FINFIN.SA.GSMF.5
Senior Sales Representative - Group Sales	FINFIN.SA.GSMF.4
Sales Representative - Group Sales	FINFIN.SA.GSMF.3
Bancassurance - Multi-focus	
Senior Sales Manager - Bancassurance	FINFIN.SA.BAMF.6
Sales Manager - Bancassurance	FINFIN.SA.BAMF.5
Senior Sales Representative - Bancassurance	FINFIN.SA.BAMF.4
Sales Representative - Bancassurance	FINFIN.SA.BAMF.3
Sales Support - Multi-Focus	
Manager - Sales Support Operations	FINFIN.SA.SSMF.5
Team Leader - Sales Support	FINFIN.SA.SSMF.4
Senior Sales Administrator/Internal Sales Representative	FINFIN.SA.SSMF.3
Sales Administrator/Internal Sales Representative	FINFIN.SA.SSMF.2

Position Family: Wealth Management Retail Brokerage - Product Specialist

Financial Planning - Certified Financial Planner

Head of Financial Advice - Multi-focus	FINWMT.PS.FPCF.6
Practice Manager - Financial Advice - Multi-focus	FINWMT.PS.FPCF.5
Senior Financial Advisor - Multi-focus	FINWMT.PS.FPCF.4
Financial Advisor - Multi-Focus	FINWMT.PS.FPCF.3

Financial Planning - Paraplanning

Para Planner - Financial Advice - Multi-focus	FINWMT.PS.FPPP.2

Position Description

Position title:	**Chief Actuary Multi-Focus**
Position code:	**FININS.AS.CAMF.7**
Level:	**7**

Responsible for

The financial management and reporting of the business at the highest level, including the statutory responsibilities of the Appointed Actuary role.

Report to

Chief Financial Officer, Chief Executive Officer, Chief Operating Officer

Supervises

Actuarial Team

Main activities

- Providing technical actuarial leadership, development and management. Initiating and directing investigations / research / analysis, delivery of quality financial information / insights and setting best estimate assumptions future projections, and for support of strategic and operational planning.
- Ensuring statutory reporting and financial management responsibilities of Appointed Actuary are met, as required under financial services legislation and in line with the requirements of the Institute of Actuaries of professional standards.
- Ensuring accurate internal management reporting, as to enable senior management to understand the critical business indicators and as a base for all decision making.
- Reporting to external investors with significant level of disclosure.
- Developing a financial risk management framework and optimisation of capital employed; alternative forms of capital investigated and implemented.
- Providing financial strategies and the identification of new opportunities for profit improvement and business growth.
- Signing off on product pricing and product development.
- Representing the company in all negotiations of major actuarial significance.

Key skills

- Experience at dealing with a Board and being a key advisor to the Board.
- Experience at dealing with and representing the best interests and rights of both policy holders and shareholders.
- Superior knowledge of Actuarial aspects of Life Insurance Act 1995, APRA Prudential Rules, and all related statutory rules and regulations.
- Superior technical capability / knowledge of embedded values including the application of market best practice methodologies across the business.
- Superior technical capability / knowledge of n Actuarial reporting standards and valuation practice
- Proven leadership and motivational abilities.
- The ability to think strategically, innovatively and laterally.

Internal contacts

CEO, Board Members, Chief Financial Officer, Business Unit Leaders

External contacts

Treasury, Investors

Typical experience

At least 15 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Principal Actuary – Multi-Area Commercial Lines**
Position code:	**FININS.AS.MACL.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Multi-Area Commercial Lines**
Position code:	**FININS.AS.MACL.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Multi-Area Commercial Lines**
Position code:	**FININS.AS.MACL.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst - Multi-Area Commercial Lines**
Position code:	**FININS.AS.MACL.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Multi-Area Personal Lines**
Position code:	**FININS.AS.MAPL.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Multi-Area Personal Lines**
Position code:	**FININS.AS.MAPL.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Multi-Area Personal Lines**
Position code:	**FININS.AS.MAPL.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Multi-Area Personal Lines**
Position code:	**FININS.AS.MAPL.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Multi-Area Group Life**
Position code:	**FININS.AS.MACO.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Multi-Area Group Life**
Position code:	**FININS.AS.MACO.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Multi-Area Group Life**
Position code:	**FININS.AS.MACO.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst Group Life**
Position code:	**FININS.AS.MACO.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Multi-Area Individual Life**
Position code:	**FININS.AS.MALF.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Multi-Area Individual Life**
Position code:	**FININS.AS.MALF.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Multi-Area Individual Life**
Position code:	**FININS.AS.MALF.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Multi-Area Individual Life**
Position code:	**FININS.AS.MALF.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Multi-Area Multi-focus**
Position code:	**FININS.AS.MAMF.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Multi-Area Multi-focus**
Position code:	**FININS.AS.MAMF.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Multi-Area Multi-focus**
Position code:	**FININS.AS.MAMF.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Multi-Area Multi-focus**
Position code:	**FININS.AS.MAMF.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Actuarial Student – Multi-Area Multi-focus**
Position code:	**FININS.AS.MAMF.2**
Level:	**2**

Responsible for

Supporting key Actuarial activities through the provision of Actuarial support functions.

Report to

Fully Qualified Actuary.

Supervises

No supervisory responsibilities.

Main activities

- Maintaining asset/liability databases for new products and composites.
- Updating database assets, liability, cash flow and unit data on a regular basis.
- Providing earning rates, crediting rates and factors to valuation teams.
- Understanding asset/liability management system methodology and suggesting improvements.
- Providing IER, adjusted earning rate and financial data for full crediting rate review on a quarterly basis.
- Distributing crediting rates.
- Providing data for review of short-term products.
- Providing technical support for Actuaries.
- Developing and using models for Actuarial processes, e.g., profitability and valuation.
- Advising internal clients on process methods and outcomes. Drafting Actuarial reports.

Key skills

Nil.

Internal contacts

Other Actuaries; Product Designers; Finance departments; Auditors.

External contacts

Other Actuaries; Finance departments; Auditors.

Typical experience

Completion of 5-8 Actuarial subjects.

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 6**
Position code:	**FININS.AS.MA00.6**
Level:	**6**

Responsible for
Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to
Underwriting Executive, General Manager.

Supervises
Senior actuaries.

Main activities
- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills
- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts
Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts
Actuaries in other organisations, Institute of Actuaries.

Typical experience
At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 5**
Position code:	**FININS.AS.MA00.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 4**
Position code:	**FININS.AS.MA00.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 3**
Position code:	**FININS.AS.MA00.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 2**
Position code:	**FININS.AS.MA00.2**
Level:	**2**

Responsible for

Supporting key Actuarial activities through the provision of Actuarial support functions.

Report to

Fully Qualified Actuary.

Supervises

No supervisory responsibilities.

Main activities

- Maintaining asset/liability databases for new products and composites.
- Updating database assets, liability, cash flow and unit data on a regular basis.
- Providing earning rates, crediting rates and factors to valuation teams.
- Understanding asset/liability management system methodology and suggesting improvements.
- Providing IER, adjusted earning rate and financial data for full crediting rate review on a quarterly basis.
- Distributing crediting rates.
- Providing data for review of short-term products.
- Providing technical support for Actuaries.
- Developing and using models for Actuarial processes, e.g., profitability and valuation.
- Advising internal clients on process methods and outcomes. Drafting Actuarial reports.

Key skills

Nil.

Internal contacts

Other Actuaries; Product Designers; Finance departments; Auditors.

External contacts

Other Actuaries; Finance departments; Auditors.

Typical experience

Completion of 5-8 Actuarial subjects.

Other comments

Position Description

Position title:	**Reserving/Valuation - Combined - Level 6**
Position code:	**FININS.AS.RE00.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Reserving/Valuation - Combined - Level 5**
Position code:	**FININS.AS.RE00.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Reserving/Valuation - Combined - Level 4**
Position code:	**FININS.AS.RE00.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Reserving/Valuation - Combined - Level 3**
Position code:	**FININS.AS.RE00.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Pricing - Combined - Level 6**
Position code:	**FININS.AS.PR00.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Pricing - Combined - Level 5**
Position code:	**FININS.AS.PR00.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Pricing - Combined - Level 4**
Position code:	**FININS.AS.PR00.4**
Level:	**4**

Responsible for
Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to
Actuarial Manager.

Supervises
Actuarial Students.

Main activities
- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills
- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts
Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts
Actuaries in other organisations, Institute of Actuaries.

Typical experience
At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Pricing - Combined - Level 3**
Position code:	**FININS.AS.PR00.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Reserving/Valuation Commercial Lines**
Position code:	**FININS.AS.RECL.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Reserving/Valuation Commercial Lines**
Position code:	**FININS.AS.RECL.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Reserving/Valuation Commercial Lines**
Position code:	**FININS.AS.RECL.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Reserving/Valuation Commercial Lines**
Position code:	**FININS.AS.RECL.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Reserving/Valuation Personal Lines**
Position code:	**FININS.AS.REPL.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Reserving/Valuation Personal Lines**
Position code:	**FININS.AS.REPL.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Reserving/Valuation Personal Lines**
Position code:	**FININS.AS.REPL.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst - Reserving/Valuation Personal Lines**
Position code:	**FININS.AS.REPL.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Reserving/Valuation Group Life**
Position code:	**FININS.AS.RECO.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Reserving/Valuation Group Life**
Position code:	**FININS.AS.RECO.5**
Level:	**5**

Responsible for
Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to
Head of Actuary

Supervises
Actuaries.

Main activities
- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills
- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts
Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts
Actuaries in other organisations, Institute of Actuaries.

Typical experience
At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Reserving/Valuation Group Life**
Position code:	**FININS.AS.RECO.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Reserving/Valuation Group Life**
Position code:	**FININS.AS.RECO.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Reserving/Valuation Individual Life**
Position code:	**FININS.AS.RELF.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Reserving/Valuation Individual Life**
Position code:	**FININS.AS.RELF.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Reserving/Valuation Individual Life**
Position code:	**FININS.AS.RELF.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Reserving/Valuation Individual Life**
Position code:	**FININS.AS.RELF.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Valuation/PricingReserving/Valuation Multi-focus**
Position code:	**FININS.AS.REMF.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary –Reserving/Valuation Multi-focus**
Position code:	**FININS.AS.REMF.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Reserving/Valuation Multi-focus**
Position code:	**FININS.AS.REMF.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Reserving/Valuation Multi-focus**
Position code:	**FININS.AS.REMF.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Pricing Commercial Lines**
Position code:	**FININS.AS.PRCL.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Pricing Commercial Lines**
Position code:	**FININS.AS.PRCL.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Pricing Commercial Lines**
Position code:	**FININS.AS.PRCL.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Pricing Commercial Lines**
Position code:	**FININS.AS.PRCL.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Pricing Personal Lines**
Position code:	**FININS.AS.PRPL.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Pricing Personal Lines**
Position code:	**FININS.AS.PRPL.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Pricing Personal Lines**
Position code:	**FININS.AS.PRPL.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Pricing Personal Lines**
Position code:	**FININS.AS.PRPL.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Pricing Group Life**
Position code:	**FININS.AS.PRCO.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Pricing Group Life**
Position code:	**FININS.AS.PRCO.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Pricing Group Life**
Position code:	**FININS.AS.PRCO.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Pricing Group Life**
Position code:	**FININS.AS.PRCO.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Pricing Individual Life**
Position code:	**FININS.AS.PRLF.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Pricing Individual Life**
Position code:	**FININS.AS.PRLF.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Pricing Individual Life**
Position code:	**FININS.AS.PRLF.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Pricing Individual Life**
Position code:	**FININS.AS.PRLF.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Principal Actuary – Pricing Multi-focus**
Position code:	**FININS.AS.PRMF.6**
Level:	**6**

Responsible for

Managing the department, developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business.

Report to

Underwriting Executive, General Manager.

Supervises

Senior actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Determining the actuarial bases and principles of all actuarial investigations, analysis and costing.
- Designing, developing and maintaining an on-going mathematical and statistical research facility.
- Directing and developing subordinate Actuaries, Managers and Research Staff, and ensuring all divisional personnel fully understand their accountabilities and are trained to achieve them.
- Providing actuarial counsel and advice to Senior Management.
- Maintaining a dialogue with State and Federal Government Authorities, Institutions and Associations.
- Representing the company in all negotiations of major actuarial significance.
- Ensuring data processing facilities and computer modelling techniques are effectively utilised to facilitate efficient actuarial research programs.
- Ensuring the organisation complies with statutory obligations by the timely preparation and submission of returns and reports requiring actuarial authorisation or approval.
- May act as an individual specialist setting direction for operations which are not directly supervised.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to undertake major analysis of business requirements at the strategic level.
- Demonstrated management skills and influential interpersonal skills.
- Ability to present proposals at a strategic level and to meet client targets.

Internal contacts

Actuarial Department, Management in Marketing, Finance & Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 8-14 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Senior Actuary – Pricing Multi-focus**
Position code:	**FININS.AS.PRMF.5**
Level:	**5**

Responsible for

Developing actuarial strategies, monitoring financial solvency and providing a framework for financial and marketing programs to assist in the development of new business. May have managerial responsibilities

Report to

Head of Actuary

Supervises

Actuaries.

Main activities

- Assisting in the development of strategy and business direction by contributing to financial planning by forecasting revenue and by determining levels of provisions and reserves sufficient to meet future liabilities.
- Contributing to the long term growth and stability of the organisation by advising, testing and recommending new and modified contracts.
- Developing the actuarial bases and principles for actuarial investigations, analysis and costing in conjunction with the Senior Actuarial Manager.
- Undertaking mathematical and statistical research and utilising data processing facilities and computer modelling techniques to facilitate actuarial research programs.
- Conferring Government Authorities, Institutions and Associations and ensuring the submission of statutory statistical returns and reports.
- Liaising with the marketing department in assessing the feasibility of new products.
- Signing off on reports drafted by Staff.
- Managing the project team and client relationship.
- Performing appraisals of direct reports, providing career development and providing peer review of project outcomes.

Key skills

- Extensive knowledge of existing products, future strategies, competitor products and the insurance industry.
- Ability to present proposals and solutions at a strategic level and to meet client targets.
- Demonstrated management skills and influential interpersonal skills.

Internal contacts

Actuarial department, Management in Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 6-7 years insurance experience together with degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuary – Pricing Multi-focus**
Position code:	**FININS.AS.PRMF.4**
Level:	**4**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuarial Manager.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 4-5 years insurance experience together with Degree qualification and 3-4 years graduate study and registration with the New Zealand Society of Actuaries.

Other comments

Position Description

Position title:	**Actuarial Analyst – Pricing Multi-focus**
Position code:	**FININS.AS.PRMF.3**
Level:	**3**

Responsible for

Performing actuarial calculations to assist in monitoring solvency and developing financial and marketing programs.

Report to

Actuary/Senior Actuary.

Supervises

Actuarial Students.

Main activities

- Conducting regular reviews of pricing, superannuation triennials, valuation and reporting techniques.
- Performing actuarial investigations, analysis and costing for senior management.
- Utilising computer modelling techniques to complete actuarial research programs.
- Drafting reports on results of investigations.
- Assisting in dialogue Government authorities, institutions and associations.
- Participating in the submission of statutory statistical returns and reports.
- Signing off reports on results of investigations.
- Providing technical advice and guidance to less experienced actuarial staff and clients.

Key skills

- Good knowledge of the insurance industry, existing products and competitor products.
- Ability to analyse, interpret and extrapolate data from a number of sources and resolve complex issues.
- Ability to communicate technical information to clients in a simple manner and present proposals.

Internal contacts

Actuarial department, Sales and Marketing, Finance and Administration, Underwriting.

External contacts

Actuaries in other organisations, Institute of Actuaries.

Typical experience

At least 2-3 years insurance experience together with Degree qualification and 3-4 years graduate study

Other comments

Position Description

Position title:	**Head of Data Analytics**
Position code:	**FINFIN.AB.MAMF.7**
Level:	**7**

Responsible for

Designing and implementing big data technologies through the application of high performance computing, large scale data integration and emerging analytical platform. Has significant input into technical direction of the data team and is involved in strategy decisions.

Report to

General Manager - IT / Infrastructure or Technical / Delivery Leader - Big Data

Supervises

Data Analyst teams

Main activities

- Informs strategy and architecture through cutting edge research and industry best practice knowledge.
- Influences senior stakeholders through deep technical expertise, customer/domain knowledge and vision and objective, collaborates with senior stakeholders to secure funding for new initiatives.
- Influences and leads a coherent cross-business approach and strategic/tactical plan for big data initiatives.
- Interacts with product and service teams to identify questions and issues for data analysis and experiments.
- Leads the translation of visualisation designs into physical solutions using tools such as tableau, HTML, Java and DSJ3.
- Demonstrates innovation thought concrete application of technical skills to complex business problems (e.g) new data structures/storage to support advanced machine learning algorithms).
- Supervising the activities of a team of assigned data analysts, to provide effective analysis, design, programming and testing skills in the production of large data systems, or performing specialist roles in data research and technology.
- Supporting the internal quality and control requirements defined by company policy, possibly acting as a cost account manager.
- Lead complex initiatives and shape the teams agenda. Builds/develops team capability and talent.
- Mentor, guide, and influence the Analytics community in the organisation.
- Working with massive and complex data sets from multiple sources, utilising big data tools and techniques for the purposes of analysing, providing insight and validating hypotheses.
- Translating analytical insights into concrete, actionable recommendations for business, process or product improvements.

Key skills

- Expert in manipulating and analysing complex, high-volume, high dimensionality data and metadata from varying sources.
- Strong passion for empirical research and for answering hard questions with data.
- Good written and oral communications, identifying problems and process management skills with the ability to work within or lead a team.
- Ability to communicate complex quantitative analysis in a clear, precise, and actionable manner.
- Able to describe technical topics to laymen stakeholders.
- Data modelling and data analysis.
- Familiarity with relational/non-relational data manipulation, machine learning, and scientific statistical analysis.
- SQL on Massively Parallel Processing (MPP) relational databases.
- Experience working in DevOps and Agile environments, as well as continuous integration.
- Strong software engineering and coding skills, ideally in a data intensive environment.
- Experience in distributed / high performance computing systems, such as grid computing or MPP systems.

Internal contacts

Management, Estimating Manager, Project Teams, Analytics community across the organisation, Business user groups

External contacts

Academia and research organisations

Typical experience

10+ years of experience in commercial Information Technology coupled with tertiary qualifications (may be at Masters level) in Engineering, Computer Science or a related discipline.

Other comments

Position Description

Position title:	**Senior Manager Data Analytics**
Position code:	**FINFIN.AB.MAMF.6**
Level:	**6**

Responsible for

Designing and implementing big data technologies through the application of high performance computing, large scale data integration and emerging analytical platforms.

Report to

Head of Data Analytics

Supervises

May supervise Junior Analytics team

Main activities

- Partnering closely with business analysts and data scientists to identify data sources relevant to solving business problems and help design the optimal combination of data sources and analytical techniques for each problem.
- Working with large data sets from multiple sources utilising big data tools and techniques to prepare data sources for efficient analysis and insight generation.
- Understanding the quality of data sourced, its management, and liaising with data scientists and analysts to management the impact of data quality issues.
- Driving the collection of new data and the refinement of existing data sources.
- Developing best practices for instrumentation and experimentation and communicate those to solution delivery teams.
- Interacts with product and service teams to identify questions and issues for data analysis and experiments.
- Develops algorithms and automated processes to cleanse, integrate and evaluate large data sets from multiple disparate sources.
- Working with massive and complex data sets from multiple sources, utilising big data tools and techniques for the purposes of analysing, providing insight and validating hypotheses.
- Performing deep dive analyses of experiments through reliable modelling methods that include numerous explanatory variables and covariates.
- Translating analytical insights into concrete, actionable recommendations for business, process or product improvements.

Key skills

- Data modelling and data analysis and the ability to manipulate and analyse complex, high-volume, high dimensionality data and metadata from varying sources.
- SQL on Massively Parallel Processing (MPP) relational databases.
- Experience working in DevOps and Agile environments, as well as continuous integration.
- Strong software engineering and coding skills, ideally in a data intensive environment.
- Experience in distributed / high performance computing systems, such as grid computing or MPP systems.
- Ability to communicate complex quantitative analysis in a clear, precise, and actionable manner.
- Ability to strongly advocate technical positions while still appreciating alternative proposals.
- Strong passion for empirical research and for answering hard questions with data.

Internal contacts

Big Data Solution Architects, Technical Architects, Consultants, Platform Developers, Application Developers.

External contacts

Big data / systems integration product vendors

Typical experience

7 - 10 years of experience in commercial Information Technology coupled with tertiary qualifications (may be at Masters level) in Computer Science or a related discipline.

Other comments

Position Description

Position title:	**Manager Data Analytics**
Position code:	**FINFIN.AB.MAMF.5**
Level:	**5**

Responsible for

Identifying, prioritising and undertaking a range of ranalytical activities leveraging all available data assets to help solve complex business problems through the application of advanced statistical modelling techniques.

Report to

Senior Manager Data Analytics

Supervises

Senior Data Analyst, Data Analyst

Main activities

- Interacts with product and service teams to identify questions and issues for data analysis.
- Providing hands-on support as required in formulating a coherent cross-business approach and strategic/tactical plan for big data initiatives.
- Learning, adopting and leveraging data science best practice to delivery quantitative improvements to the analytics and process modelling functions.
- Working with massive and complex data sets from multiple sources, utilising big data tools and techniques for the purposes of analysing and providing insight
- Translating analytical insights into concrete, actionable recommendations for business, process or product improvements.
- Making recommendations for the collection of new data or the refinement of existing data sources and storage.
- Developing best practice guidelines for instrumentation and experimentation.

Key skills

- Ability to manipulate and analyse complex, high-volume, high dimensionality data and metadata from varying sources.
- Strong passion for empirical research and for answering hard questions with data.
- Expert knowledge of analysis tools and big data technologies (Map/Reduce, Hadoop, Hive, etc).
- Familiarity with relational/non-relational data manipulation, machine learning, and scientific statistical analysis.
- Ability to communicate complex quantitative analysis in a clear, precise, and actionable manner.
- Flexible analytical approach that allows for results at varying levels of precision.
- Solid understanding and experience with programming logic and various paradigms.

Internal contacts

Analytics community across the organisation; Business user groups

External contacts

Academia and research organisations

Typical experience

At least 5-7 years of experience in commercial Information Technology coupled with tertiary qualifications (may be at Masters level) in Computer Science or a related discipline.

Other comments

Position Description

Position title:	**Senior Data Analyst**
Position code:	**FINFIN.AB.MAMF.4**
Level:	**4**

Responsible for

Providing information or data from internal and external sources to customers and management to support business decisions and projects.

Report to

Senior Data Analyst/Manager Data Analytics

Supervises

No supervisory responsibilities.

Main activities

- Identifying, preparing, analysing and presenting data using computerised technology.
- Responding to requests for information by summarising and analysing internal and external data sources.
- Analysing information using statistical/data analysis techniques.
- Providing guidance and support to business in determining and recommending information needs.
- Providing regular reports to Management summarising business performance.
- Designing and constructing databases to facilitate ongoing generation of specific reports required by the business.
- Liaising with database specialists to develop queries and extract required data from business databases.

Key skills

- Good communication skills, both written and verbal.
- High level of numeracy.
- Knowledge of database software, including MS Access and Excel.
- May have some basic SQL programming skills.
- Basic knowledge of database software, including MS Access and Excel and/or a commercial statistical software packages such as SAS, SPSS, Tableau, Qlikview, etc

Internal contacts

Database Administrators, Database Developers, Data Analysts, Sales and Marketing.

External contacts

Research companies, Statistics New Zealand.

Typical experience

Degree qualified in Business, Statistics or a related discipline. At least 1-2 years experience in data/information analysis, design and administration.

Other comments

Position Description

Position title:	**Data Analyst**
Position code:	**FINFIN.AB.MAMF.3**
Level:	**3**

Responsible for

Providing information or data from internal and external sources to customers and management to support business decisions and projects.

Report to

Senior Data Analyst/Manager Data Analytics

Supervises

No supervisory responsibilities.

Main activities

- Identifying, preparing, analysing and presenting data using computerised technology.
- Responding to requests for information by summarising and analysing internal and external data sources.
- Analysing information using statistical/data analysis techniques.
- Providing guidance and support to business in determining and recommending information needs.
- Providing regular reports to Management summarising business performance.
- Designing and constructing databases to facilitate ongoing generation of specific reports required by the business.
- Liaising with database specialists to develop queries and extract required data from business databases.

Key skills

- Good communication skills, both written and verbal.
- High level of numeracy.
- Knowledge of database software, including MS Access and Excel.
- May have some basic SQL programming skills.
- Basic knowledge of database software, including MS Access and Excel and/or a commercial statistical software packages such as SAS, SPSS, Tableau, Qlikview, etc

Internal contacts

Database Administrators, Database Developers, Data Analysts, Sales and Marketing.

External contacts

Research companies, Statistics New Zealand.

Typical experience

Degree qualified in Business, Statistics or a related discipline. At least 1-2 years experience in data/information analysis, design and administration.

Other comments

Position Description

Position title:	**Senior Manager Predictive Analytics**
Position code:	**FINFIN.AB.PAMF.6**
Level:	**6**

Responsible for

Designing and implementing big data technologies through the application of high performance computing, large scale data integration and emerging analytical platforms.

Report to

Head of Data Analytics

Supervises

May supervise Junior Analytics team

Main activities

- Partnering closely with business analysts and data scientists to identify data sources relevant to solving business problems and help design the optimal combination of data sources and analytical techniques for each problem.
- Working with large data sets from multiple sources utilising big data tools and techniques to prepare data sources for efficient analysis and insight generation.
- Understanding the quality of data sourced, its management, and liaising with data scientists and analysts to management the impact of data quality issues.
- Driving the collection of new data and the refinement of existing data sources.
- Developing best practices for instrumentation and experimentation and communicate those to solution delivery teams.
- Interacts with product and service teams to identify questions and issues for data analysis and experiments.
- Develops algorithms and automated processes to cleanse, integrate and evaluate large data sets from multiple disparate sources.
- Working with massive and complex data sets from multiple sources, utilising big data tools and techniques for the purposes of analysing, providing insight and validating hypotheses.
- Performing deep dive analyses of experiments through reliable modelling methods that include numerous explanatory variables and covariates.
- Translating analytical insights into concrete, actionable recommendations for business, process or product improvements.

Key skills

- Data modelling and data analysis and the ability to manipulate and analyse complex, high-volume, high dimensionality data and metadata from varying sources.
- SQL on Massively Parallel Processing (MPP) relational databases.
- Experience working in DevOps and Agile environments, as well as continuous integration.
- Strong software engineering and coding skills, ideally in a data intensive environment.
- Experience in distributed / high performance computing systems, such as grid computing or MPP systems.
- Ability to communicate complex quantitative analysis in a clear, precise, and actionable manner.
- Ability to strongly advocate technical positions while still appreciating alternative proposals.
- Strong passion for empirical research and for answering hard questions with data.

Internal contacts

Big Data Solution Architects, Technical Architects, Consultants, Platform Developers, Application Developers.

External contacts

Big data / systems integration product vendors

Typical experience

7 - 10 years of experience in commercial Information Technology coupled with tertiary qualifications (may be at Masters level) in Computer Science or a related discipline.

Other comments

Position Description

Position title:	**Manager Predictive Analytics**
Position code:	**FINFIN.AB.PAMF.5**
Level:	**5**

Responsible for

Identifying, prioritising and undertaking a range of ranalytical activities leveraging all available data assets to help solve complex business problems through the application of advanced statistical modelling techniques.

Report to

Senior Manager Data Analytics

Supervises

Senior Data Analyst, Data Analyst

Main activities

- Interacts with product and service teams to identify questions and issues for data analysis.
- Providing hands-on support as required in formulating a coherent cross-business approach and strategic/tactical plan for big data initiatives.
- Learning, adopting and leveraging data science best practice to delivery quantitative improvements to the analytics and process modelling functions.
- Working with massive and complex data sets from multiple sources, utilising big data tools and techniques for the purposes of analysing and providing insight
- Translating analytical insights into concrete, actionable recommendations for business, process or product improvements.
- Making recommendations for the collection of new data or the refinement of existing data sources and storage.
- Developing best practice guidelines for instrumentation and experimentation.

Key skills

- Ability to manipulate and analyse complex, high-volume, high dimensionality data and metadata from varying sources.
- Strong passion for empirical research and for answering hard questions with data.
- Expert knowledge of analysis tools and big data technologies (Map/Reduce, Hadoop, Hive, etc).
- Familiarity with relational/non-relational data manipulation, machine learning, and scientific statistical analysis.
- Ability to communicate complex quantitative analysis in a clear, precise, and actionable manner.
- Flexible analytical approach that allows for results at varying levels of precision.
- Solid understanding and experience with programming logic and various paradigms.

Internal contacts

Analytics community across the organisation; Business user groups

External contacts

Academia and research organisations

Typical experience

At least 5-7 years of experience in commercial Information Technology coupled with tertiary qualifications (may be at Masters level) in Computer Science or a related discipline.

Other comments

Position Description

Position title:	**Senior Analyst - Predictive Analytics**
Position code:	**FINFIN.AB.PAMF.4**
Level:	**4**

Responsible for

Providing information or data from internal and external sources to customers and management to support business decisions and projects.

Report to

Senior Data Analyst/Manager Data Analytics

Supervises

No supervisory responsibilities.

Main activities

- Identifying, preparing, analysing and presenting data using computerised technology.
- Responding to requests for information by summarising and analysing internal and external data sources.
- Analysing information using statistical/data analysis techniques.
- Providing guidance and support to business in determining and recommending information needs.
- Providing regular reports to Management summarising business performance.
- Designing and constructing databases to facilitate ongoing generation of specific reports required by the business.
- Liaising with database specialists to develop queries and extract required data from business databases.

Key skills

- Good communication skills, both written and verbal.
- High level of numeracy.
- Knowledge of database software, including MS Access and Excel.
- May have some basic SQL programming skills.
- Basic knowledge of database software, including MS Access and Excel and/or a commercial statistical software packages such as SAS, SPSS, Tableau, Qlikview, etc

Internal contacts

Database Administrators, Database Developers, Data Analysts, Sales and Marketing.

External contacts

Research companies, Statistics New Zealand.

Typical experience

Degree qualified in Business, Statistics or a related discipline. At least 1-2 years experience in data/information analysis, design and administration.

Other comments

Position Description

Position title:	**Analyst - Predictive Analytics**
Position code:	**FINFIN.AB.PAMF.3**
Level:	**3**

Responsible for

Providing information or data from internal and external sources to customers and management to support business decisions and projects.

Report to

Senior Data Analyst/Manager Data Analytics

Supervises

No supervisory responsibilities.

Main activities

- Identifying, preparing, analysing and presenting data using computerised technology.
- Responding to requests for information by summarising and analysing internal and external data sources.
- Analysing information using statistical/data analysis techniques.
- Providing guidance and support to business in determining and recommending information needs.
- Providing regular reports to Management summarising business performance.
- Designing and constructing databases to facilitate ongoing generation of specific reports required by the business.
- Liaising with database specialists to develop queries and extract required data from business databases.

Key skills

- Good communication skills, both written and verbal.
- High level of numeracy.
- Knowledge of database software, including MS Access and Excel.
- May have some basic SQL programming skills.
- Basic knowledge of database software, including MS Access and Excel and/or a commercial statistical software packages such as SAS, SPSS, Tableau, Qlikview, etc

Internal contacts

Database Administrators, Database Developers, Data Analysts, Sales and Marketing.

External contacts

Research companies, Statistics New Zealand.

Typical experience

Degree qualified in Business, Statistics or a related discipline. At least 1-2 years experience in data/information analysis, design and administration.

Other comments

Position Description

Position title:	**Head of Catastrophe Modelling**
Position code:	**FININS.AB.HCMF.7**
Level:	**7**

Responsible for

Designing and implementing big data technologies through the application of high performance computing, large scale data integration and emerging analytical platform. Has significant input into technical direction of the data team and is involved in strategy decisions.

Report to

General Manager - IT / Infrastructure or Technical / Delivery Leader - Big Data

Supervises

Data Analyst teams

Main activities

- Informs strategy and architecture through cutting edge research and industry best practice knowledge.
- Influences senior stakeholders through deep technical expertise, customer/domain knowledge and vision and objective, collaborates with senior stakeholders to secure funding for new initiatives.
- Influences and leads a coherent cross-business approach and strategic/tactical plan for big data initiatives.
- Interacts with product and service teams to identify questions and issues for data analysis and experiments.
- Leads the translation of visualisation designs into physical solutions using tools such as tableau, HTML, Java and DSJ3.
- Demonstrates innovation thought concrete application of technical skills to complex business problems (e.g) new data structures/storage to support advanced machine learning algorithms).
- Supervising the activities of a team of assigned data analysts, to provide effective analysis, design, programming and testing skills in the production of large data systems, or performing specialist roles in data research and technology.
- Supporting the internal quality and control requirements defined by company policy, possibly acting as a cost account manager.
- Lead complex initiatives and shape the teams agenda. Builds/develops team capability and talent.
- Mentor, guide, and influence the Analytics community in the organisation.
- Working with massive and complex data sets from multiple sources, utilising big data tools and techniques for the purposes of analysing, providing insight and validating hypotheses.
- Translating analytical insights into concrete, actionable recommendations for business, process or product improvements.

Key skills

- Expert in manipulating and analysing complex, high-volume, high dimensionality data and metadata from varying sources.
- Strong passion for empirical research and for answering hard questions with data.
- Good written and oral communications, identifying problems and process management skills with the ability to work within or lead a team.
- Ability to communicate complex quantitative analysis in a clear, precise, and actionable manner.
- Able to describe technical topics to laymen stakeholders.
- Data modelling and data analysis.
- Familiarity with relational/non-relational data manipulation, machine learning, and scientific statistical analysis.
- SQL on Massively Parallel Processing (MPP) relational databases.
- Experience working in DevOps and Agile environments, as well as continuous integration.
- Strong software engineering and coding skills, ideally in a data intensive environment.
- Experience in distributed / high performance computing systems, such as grid computing or MPP systems.

Internal contacts

Management, Estimating Manager, Project Teams, Analytics community across the organisation, Business user groups

External contacts

Academia and research organisations

Typical experience

10+ years of experience in commercial Information Technology coupled with tertiary qualifications (may be at Masters level) in Engineering, Computer Science or a related discipline.

Other comments

Position Description

Position title:	**Senior Manager - Catastrophe Modelling**
Position code:	**FININS.AB.CMMF.6**
Level:	**6**

Responsible for
Designing and implementing big data technologies through the application of high performance computing, large scale data integration and emerging analytical platforms.

Report to
Head of Data Analytics

Supervises
May supervise Junior Analytics team

Main activities
- Partnering closely with business analysts and data scientists to identify data sources relevant to solving business problems and help design the optimal combination of data sources and analytical techniques for each problem.
- Working with large data sets from multiple sources utilising big data tools and techniques to prepare data sources for efficient analysis and insight generation.
- Understanding the quality of data sourced, its management, and liaising with data scientists and analysts to management the impact of data quality issues.
- Driving the collection of new data and the refinement of existing data sources.
- Developing best practices for instrumentation and experimentation and communicate those to solution delivery teams.
- Interacts with product and service teams to identify questions and issues for data analysis and experiments.
- Develops algorithms and automated processes to cleanse, integrate and evaluate large data sets from multiple disparate sources.
- Working with massive and complex data sets from multiple sources, utilising big data tools and techniques for the purposes of analysing, providing insight and validating hypotheses.
- Performing deep dive analyses of experiments through reliable modelling methods that include numerous explanatory variables and covariates.
- Translating analytical insights into concrete, actionable recommendations for business, process or product improvements.

Key skills
- Data modelling and data analysis and the ability to manipulate and analyse complex, high-volume, high dimensionality data and metadata from varying sources.
- SQL on Massively Parallel Processing (MPP) relational databases.
- Experience working in DevOps and Agile environments, as well as continuous integration.
- Strong software engineering and coding skills, ideally in a data intensive environment.
- Experience in distributed / high performance computing systems, such as grid computing or MPP systems.
- Ability to communicate complex quantitative analysis in a clear, precise, and actionable manner.
- Ability to strongly advocate technical positions while still appreciating alternative proposals.
- Strong passion for empirical research and for answering hard questions with data.

Internal contacts
Big Data Solution Architects, Technical Architects, Consultants, Platform Developers, Application Developers.

External contacts
Big data / systems integration product vendors

Typical experience
7 - 10 years of experience in commercial Information Technology coupled with tertiary qualifications (may be at Masters level) in Computer Science or a related discipline.

Other comments

Position Description

Position title:	**Manager - Catastrophe Modelling**
Position code:	**FININS.AB.CMMF.5**
Level:	**5**

Responsible for

Identifying, prioritising and undertaking a range of ranalytical activities leveraging all available data assets to help solve complex business problems through the application of advanced statistical modelling techniques.

Report to

Senior Manager Data Analytics

Supervises

Senior Data Analyst, Data Analyst

Main activities

- Interacts with product and service teams to identify questions and issues for data analysis.
- Providing hands-on support as required in formulating a coherent cross-business approach and strategic/tactical plan for big data initiatives.
- Learning, adopting and leveraging data science best practice to delivery quantitative improvements to the analytics and process modelling functions.
- Working with massive and complex data sets from multiple sources, utilising big data tools and techniques for the purposes of analysing and providing insight
- Translating analytical insights into concrete, actionable recommendations for business, process or product improvements.
- Making recommendations for the collection of new data or the refinement of existing data sources and storage.
- Developing best practice guidelines for instrumentation and experimentation.

Key skills

- Ability to manipulate and analyse complex, high-volume, high dimensionality data and metadata from varying sources.
- Strong passion for empirical research and for answering hard questions with data.
- Expert knowledge of analysis tools and big data technologies (Map/Reduce, Hadoop, Hive, etc).
- Familiarity with relational/non-relational data manipulation, machine learning, and scientific statistical analysis.
- Ability to communicate complex quantitative analysis in a clear, precise, and actionable manner.
- Flexible analytical approach that allows for results at varying levels of precision.
- Solid understanding and experience with programming logic and various paradigms.

Internal contacts

Analytics community across the organisation; Business user groups

External contacts

Academia and research organisations

Typical experience

At least 5-7 years of experience in commercial Information Technology coupled with tertiary qualifications (may be at Masters level) in Computer Science or a related discipline.

Other comments

Position Description

Position title:	**Senior Analytst - Catastrophe Modelling**
Position code:	**FININS.AB.CMMF.4**
Level:	**4**

Responsible for

Providing information or data from internal and external sources to customers and management to support business decisions and projects.

Report to

Senior Data Analyst/Manager Data Analytics

Supervises

No supervisory responsibilities.

Main activities

- Identifying, preparing, analysing and presenting data using computerised technology.
- Responding to requests for information by summarising and analysing internal and external data sources.
- Analysing information using statistical/data analysis techniques.
- Providing guidance and support to business in determining and recommending information needs.
- Providing regular reports to Management summarising business performance.
- Designing and constructing databases to facilitate ongoing generation of specific reports required by the business.
- Liaising with database specialists to develop queries and extract required data from business databases.

Key skills

- Good communication skills, both written and verbal.
- High level of numeracy.
- Knowledge of database software, including MS Access and Excel.
- May have some basic SQL programming skills.
- Basic knowledge of database software, including MS Access and Excel and/or a commercial statistical software packages such as SAS, SPSS, Tableau, Qlikview, etc

Internal contacts

Database Administrators, Database Developers, Data Analysts, Sales and Marketing.

External contacts

Research companies, Statistics New Zealand.

Typical experience

Degree qualified in Business, Statistics or a related discipline. At least 1-2 years experience in data/information analysis, design and administration.

Other comments

Position Description

Position title:	**Analyst - Catastrophe Modelling**
Position code:	**FININS.AB.CMMF.3**
Level:	**3**

Responsible for

Providing information or data from internal and external sources to customers and management to support business decisions and projects.

Report to

Senior Data Analyst/Manager Data Analytics

Supervises

No supervisory responsibilities.

Main activities

- Identifying, preparing, analysing and presenting data using computerised technology.
- Responding to requests for information by summarising and analysing internal and external data sources.
- Analysing information using statistical/data analysis techniques.
- Providing guidance and support to business in determining and recommending information needs.
- Providing regular reports to Management summarising business performance.
- Designing and constructing databases to facilitate ongoing generation of specific reports required by the business.
- Liaising with database specialists to develop queries and extract required data from business databases.

Key skills

- Good communication skills, both written and verbal.
- High level of numeracy.
- Knowledge of database software, including MS Access and Excel.
- May have some basic SQL programming skills.
- Basic knowledge of database software, including MS Access and Excel and/or a commercial statistical software packages such as SAS, SPSS, Tableau, Qlikview, etc

Internal contacts

Database Administrators, Database Developers, Data Analysts, Sales and Marketing.

External contacts

Research companies, Statistics New Zealand.

Typical experience

Degree qualified in Business, Statistics or a related discipline. At least 1-2 years experience in data/information analysis, design and administration.

Other comments

Position Description

Position title:	**Head of Carrier Placements Commercial Lines**
Position code:	**FININS.CI.HCCL.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across Carrier Placements with product development, schemes and associations functional responsibility.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

External contacts

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Placement Director Commercial Lines**
Position code:	**FININS.CI.MACL.6**
Level:	**6**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Placement Manager Commercial Lines**
Position code:	**FININS.CI.MACL.5**
Level:	**5**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Placement Executive Commercial Lines**
Position code:	**FININS.CI.MACL.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Head of Carrier Placements Personal Lines**
Position code:	**FININS.CI.HCPL.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across Carrier Placements with product development, schemes and associations functional responsibility.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

External contacts

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Placement Director Personal Lines**
Position code:	**FININS.CI.MAPL.6**
Level:	**6**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Placement Manager Personal Lines**
Position code:	**FININS.CI.MAPL.5**
Level:	**5**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Placement Executive Personal Lines**
Position code:	**FININS.CI.MAPL.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Head of Carrier Placements Employee Benefits**
Position code:	**FININS.CI.HCEB.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across Carrier Placements with product development, schemes and associations functional responsibility.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

External contacts

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Placement Director Employee Benefits**
Position code:	**FININS.CI.MAEB.6**
Level:	**6**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Placement Manager Employee Benefits**
Position code:	**FININS.CI.MAEB.5**
Level:	**5**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Placement Executive Employee Benefits**
Position code:	**FININS.CI.MAEB.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Head of Carrier Placements Multi-Focus**
Position code:	**FININS.CI.HCMF.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across Carrier Placements with product development, schemes and associations functional responsibility.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

External contacts

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Placement Director Multi-Focus**
Position code:	**FININS.CI.MAMF.6**
Level:	**6**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Placement Manager Multi-Focus**
Position code:	**FININS.CI.MAMF.5**
Level:	**5**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Placement Executive Multi-Focus**
Position code:	**FININS.CI.MAMF.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Head of Carrier Placements - Combined - Level 7**
Position code:	**FININS.CI.HC00.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across Carrier Placements with product development, schemes and associations functional responsibility.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

External contacts

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 6**
Position code:	**FININS.CI.MA00.6**
Level:	**6**

Responsible for
Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to
Divisional Manager

Supervises
Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities
- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts
Senior Account Executives, Account Executives, Principle Brokers.

External contacts
Clients, Insurers, New Business Prospects.

Typical experience
8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 5**
Position code:	**FININS.CI.MA00.5**
Level:	**5**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 3**
Position code:	**FININS.CI.MA00.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Head of Client Service Multi-Focus**
Position code:	**FININS.CR.HAMF.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network with product development, schemes and associations functional responsibility.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

External contacts

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Client Service Manager Commercial Lines**
Position code:	**FININS.CR.AMCL.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Client Service Executive Commercial Lines**
Position code:	**FININS.CR.AMCL.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Client Service Manager Personal Lines**
Position code:	**FININS.CR.AMPL.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Client Service Executive Personal Lines**
Position code:	**FININS.CR.AMPL.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Client Service Manager Employee Benefits**
Position code:	**FININS.CR.AMEB.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Client Service Executive Employee Benefits**
Position code:	**FININS.CR.AMEB.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Client Service Manager Multi-Focus**
Position code:	**FININS.CR.AMMF.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Client Service Executive Multi-Focus**
Position code:	**FININS.CR.AMMF.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Management / Customer Service - Combined - Level 5**
Position code:	**FININS.CR.AM00.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Account Management / Customer Service - Combined - Level 3**
Position code:	**FININS.CR.AM00.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Account Manager, ensuring high quality customer service.

Report to

Account Manager / Senior Account Executive

Supervises

No supervisory responsibilities although may mentor Assistant Account Executives.

Main activities

- Assist in the maintenance of a portfolio of clients and providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Account Executives / Principals while liaising with claims staff to ensure clients interests are protected.
- Inputting client information into organisations business systems to enable tracking of client invoices and payments.
- Gathering client information to support renewal documentation.
- Ensuring the completion of activities delegated by Account Manager or Senior Account Executive within determined parameters.
- Assisting Senior Accountant Executives / Account Manager with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes including relevant legislation.
- Answering and responding to daily client enquiries.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting in the development and training of Assistant Account Executives / Entry Level Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy.
- Strong organisational and written / verbal communication skills.
- Well developed coaching or mentoring skills.

Internal contacts

Account Manager, Senior Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

3+ years insurance industry experience. May have tertiary qualifications & have completed or be completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**National Practice Leader Multi-Focus**
Position code:	**FININS.NP.NPMF.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across National Practice Groups with product development, schemes and associations functional responsibility.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- - Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Regional Practice Leader Multi-Focus**
Position code:	**FININS.NP.RPMF.6**
Level:	**6**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Technical Expert Multi-Focus**
Position code:	**FININS.NP.TEMF.4**
Level:	**4**

Responsible for

Managing the companies range of services and front line customer service in respect to accounts allocated by the account manager in the High Risk, High Revenue and/or Complex group, ensuring high quality customer service while coordinating, managing and developing Assistant Account Executives, Account Executives and Administrative staff

Report to

Account Manager

Supervises

Assistant Account Executives, Account Executives, Administration Staff.

Main activities

- Managing long term relationships with key clients who are actively involved with the organisation's insurance products, services and solutions.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defense strategies.
- Investigating and pursuing new business opportunities in conjunction with account manager.
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs
- Ensuring compliance of systems and processes with relevant legislation.
- Managing expenses by meeting income budgets and processing invoices in a timely fashion.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy skills.-Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.

Internal contacts

Account Manager, Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects, Underwriters, external specialists such as Industry Bodies, Loss Adjusters and Solicitors.

Typical experience

5+ years insurance industry experience with at least 2 years experience in a accounts management role. Tertiary qualifications coupled with Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Head of Account Commercial Lines**
Position code:	**FININS.RM.AECL.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility. Primarily works with existing accounts

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches.
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress.
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes.
- Support the development and delivery of the annual business plan, budgets and initiatives.
- Ongoing portfolio review and monitoring in line with strategies.
- Act as a technical expert to support the identification of issues.
- Lead, coach and mentor staff, providing technical expertise and guidance.

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage.
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Account Director Commercial - Large Accounts**
Position code:	**FININS.RM.AECR.6**
Level:	**6**

Responsible for

Managing a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Management

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Management and leadership experience
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets

Key skills

- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Strong presentation skills.

Internal contacts

Account Managers, Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Account Manager Commercial - Large Accounts**
Position code:	**FININS.RM.AECR.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Senior Account Executive Commercial - Large Accounts**
Position code:	**FININS.RM.AECR.4**
Level:	**4**

Responsible for

Managing the companies range of services and front line customer service in respect to accounts allocated by the account manager, ensuring high quality customer service while coordinating, managing and developing Assistant Account Executives, Account Executives and Administrative staff.. Primarily works with existing accounts.

Report to

Account Manager

Supervises

Assistant Account Executives, Account Executives, Administration Staff.

Main activities

- Managing long term relationships with key clients who are actively involved with the organisation's insurance products, services and solutions.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies.
- Investigating and pursuing new business opportunities in conjunction with account manager.
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.
- Ensuring compliance of systems and processes with the Financial Services Reform Act and other relevant legislation.
- Managing daily client enquiries.
- Managing expenses by meeting income budgets and processing invoices in a timely fashion.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching an mentoring skills.

Internal contacts

Account Manager, Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects, Underwriters, external specialists such as Industry Bodies, Loss Adjusters and Solicitors.

Typical experience

5+ years insurance industry experience with at least 2 years experience in a accounts management role. Tertiary qualifications coupled with Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Executive Commercial - Large Accounts**
Position code:	**FININS.RM.AECR.3**
Level:	**3**

Responsible for

Managing relationships at both a strategic and tactical level with Brokers to maximise the growth in net underwriting profit for the organisation.. Primarily works with existing accounts.

Report to

Area/Regional Sales Manager

Supervises

No supervisory responsibilities.

Main activities

- Managing the marketing and implementation of business initiatives to Brokers.
- Understanding the business objectives of Brokers and working with them to increase the sales of the organisation's products to deliver value for the Broker and the organisation.
- Making decisions within accreditation level on the exceptions to claims and underwriting issues that are referred by the service centre and mobile teams, or where these are beyond their accreditation, facilitate the decision making by accredited specialists.
- Establishing and developing relationships with Brokers. Monitoring key performance indicators for his/her Brokers to ensure key result areas are achieved.
- Providing advice on product features and benefits to Brokers and facilitating the provision of technical or other specialist underwriting and product advice to Brokers.
- Maintaining records for his/her group of Brokers in the organisation's database, ensuring accuracy and completeness at all times.
- Directing Brokers' queries on underwriting decisions to the appropriate underwriting authority.

Key skills

- Capacity to establish and foster relationships with Clients in order to realise mutual benefits.
- Familiar with a wide range of Brokers operations ranging from national Broker groups to independent owner operated businesses, including financial, operational and people elements.
- Knowledge of claims and underwriting processes and ability to analyse issues and make decisions, involving specialist teams to achieve the best results for the organisation and its Brokers.
- Knowledge of the financial and business drivers of performance in general insurance and the impact of their decisions on product pricing, expenses and Broker commissions.
- Knowledge of the Financial Service Reform Act and its practical implications for Brokers.

Internal contacts

Sales & Marketing; Underwriting.

External contacts

Brokers; Clients.

Typical experience

5+ years experience in financial services coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Associate Account Executive Commercial - Large Accounts**
Position code:	**FININS.RM.AECR.2**
Level:	**2**

Responsible for

Providing assistance to Account Executive(s) and/or Senior Account Executives, in all aspects of client service.. Primarily works with existing accounts.

Report to

Senior Account Executive / Account Manager

Supervises

No supervisory responsibilities.

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Account Executive or Senior Account Executive within determined parameters.
- Liaising with clients & insurers and addressing any basic enquiries raised.
- Actively seeking opportunities to improve internal business processes.Gathering relevant client information and identifying key issues to give assistance in negotiations.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Basic computer literacy.
- Ability to take instructions and work under pressure.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Entry Level Broker, Account Executives, Senior Account Executives, Account Manager

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1-2 years insurance industry experience. May possess tertiary qualifications and / or is completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Director Commercial - Mid-sized Accounts**
Position code:	**FININS.RM.AECM.6**
Level:	**6**

Responsible for

Managing a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Management

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Management and leadership experience
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets

Key skills

- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Strong presentation skills.

Internal contacts

Account Managers, Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Account Manager Commercial - Mid-sized Accounts**
Position code:	**FININS.RM.AECM.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Senior Account Executive Commercial - Mid-sized Accounts**
Position code:	**FININS.RM.AECM.4**
Level:	**4**

Responsible for

Managing the companies range of services and front line customer service in respect to accounts allocated by the account manager, ensuring high quality customer service while coordinating, managing and developing Assistant Account Executives, Account Executives and Administrative staff.. Primarily works with existing accounts.

Report to

Account Manager

Supervises

Assistant Account Executives, Account Executives, Administration Staff.

Main activities

- Managing long term relationships with key clients who are actively involved with the organisation's insurance products, services and solutions.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies.
- Investigating and pursuing new business opportunities in conjunction with account manager.
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.
- Ensuring compliance of systems and processes with the Financial Services Reform Act and other relevant legislation.
- Managing daily client enquiries.
- Managing expenses by meeting income budgets and processing invoices in a timely fashion.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching an mentoring skills.

Internal contacts

Account Manager, Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects, Underwriters, external specialists such as Industry Bodies, Loss Adjusters and Solicitors.

Typical experience

5+ years insurance industry experience with at least 2 years experience in a accounts management role. Tertiary qualifications coupled with Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Executive Commercial - Mid-sized Accounts**
Position code:	**FININS.RM.AECM.3**
Level:	**3**

Responsible for

Managing relationships at both a strategic and tactical level with Brokers to maximise the growth in net underwriting profit for the organisation.. Primarily works with existing accounts.

Report to

Area/Regional Sales Manager

Supervises

No supervisory responsibilities.

Main activities

- Managing the marketing and implementation of business initiatives to Brokers.
- Understanding the business objectives of Brokers and working with them to increase the sales of the organisation's products to deliver value for the Broker and the organisation.
- Making decisions within accreditation level on the exceptions to claims and underwriting issues that are referred by the service centre and mobile teams, or where these are beyond their accreditation, facilitate the decision making by accredited specialists.
- Establishing and developing relationships with Brokers. Monitoring key performance indicators for his/her Brokers to ensure key result areas are achieved.
- Providing advice on product features and benefits to Brokers and facilitating the provision of technical or other specialist underwriting and product advice to Brokers.
- Maintaining records for his/her group of Brokers in the organisation's database, ensuring accuracy and completeness at all times.
- Directing Brokers' queries on underwriting decisions to the appropriate underwriting authority.

Key skills

- Capacity to establish and foster relationships with Clients in order to realise mutual benefits.
- Familiar with a wide range of Brokers operations ranging from national Broker groups to independent owner operated businesses, including financial, operational and people elements.
- Knowledge of claims and underwriting processes and ability to analyse issues and make decisions, involving specialist teams to achieve the best results for the organisation and its Brokers.
- Knowledge of the financial and business drivers of performance in general insurance and the impact of their decisions on product pricing, expenses and Broker commissions.
- Knowledge of the Financial Service Reform Act and its practical implications for Brokers.

Internal contacts

Sales & Marketing; Underwriting.

External contacts

Brokers; Clients.

Typical experience

5+ years experience in financial services coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Associate Account Executive Commercial - Mid-sized Accounts**
Position code:	**FININS.RM.AECM.2**
Level:	**2**

Responsible for

Providing assistance to Account Executive(s) and/or Senior Account Executives, in all aspects of client service.. Primarily works with existing accounts.

Report to

Senior Account Executive / Account Manager

Supervises

No supervisory responsibilities.

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Account Executive or Senior Account Executive within determined parameters.
- Liaising with clients & insurers and addressing any basic enquiries raised.
- Actively seeking opportunities to improve internal business processes.Gathering relevant client information and identifying key issues to give assistance in negotiations.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Basic computer literacy.
- Ability to take instructions and work under pressure.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Entry Level Broker, Account Executives, Senior Account Executives, Account Manager

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1-2 years insurance industry experience. May possess tertiary qualifications and / or is completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Director Commercial - Small Accounts**
Position code:	**FININS.RM.AECS.6**
Level:	**6**

Responsible for

Managing a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Management

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Management and leadership experience
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets

Key skills

- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Strong presentation skills.

Internal contacts

Account Managers, Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Account Manager Commercial - Small Accounts**
Position code:	**FININS.RM.AECS.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Senior Account Executive Commercial - Small Accounts**
Position code:	**FININS.RM.AECS.4**
Level:	**4**

Responsible for

Managing the companies range of services and front line customer service in respect to accounts allocated by the account manager, ensuring high quality customer service while coordinating, managing and developing Assistant Account Executives, Account Executives and Administrative staff.. Primarily works with existing accounts.

Report to

Account Manager

Supervises

Assistant Account Executives, Account Executives, Administration Staff.

Main activities

- Managing long term relationships with key clients who are actively involved with the organisation's insurance products, services and solutions.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies.
- Investigating and pursuing new business opportunities in conjunction with account manager.
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.
- Ensuring compliance of systems and processes with the Financial Services Reform Act and other relevant legislation.
- Managing daily client enquiries.
- Managing expenses by meeting income budgets and processing invoices in a timely fashion.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching an mentoring skills.

Internal contacts

Account Manager, Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects, Underwriters, external specialists such as Industry Bodies, Loss Adjusters and Solicitors.

Typical experience

5+ years insurance industry experience with at least 2 years experience in a accounts management role. Tertiary qualifications coupled with Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Executive Commercial - Small Accounts**
Position code:	**FININS.RM.AECS.3**
Level:	**3**

Responsible for

Managing relationships at both a strategic and tactical level with Brokers to maximise the growth in net underwriting profit for the organisation.. Primarily works with existing accounts.

Report to

Area/Regional Sales Manager

Supervises

No supervisory responsibilities.

Main activities

- Managing the marketing and implementation of business initiatives to Brokers.
- Understanding the business objectives of Brokers and working with them to increase the sales of the organisation's products to deliver value for the Broker and the organisation.
- Making decisions within accreditation level on the exceptions to claims and underwriting issues that are referred by the service centre and mobile teams, or where these are beyond their accreditation, facilitate the decision making by accredited specialists.
- Establishing and developing relationships with Brokers. Monitoring key performance indicators for his/her Brokers to ensure key result areas are achieved.
- Providing advice on product features and benefits to Brokers and facilitating the provision of technical or other specialist underwriting and product advice to Brokers.
- Maintaining records for his/her group of Brokers in the organisation's database, ensuring accuracy and completeness at all times.
- Directing Brokers' queries on underwriting decisions to the appropriate underwriting authority.

Key skills

- Capacity to establish and foster relationships with Clients in order to realise mutual benefits.
- Familiar with a wide range of Brokers operations ranging from national Broker groups to independent owner operated businesses, including financial, operational and people elements.
- Knowledge of claims and underwriting processes and ability to analyse issues and make decisions, involving specialist teams to achieve the best results for the organisation and its Brokers.
- Knowledge of the financial and business drivers of performance in general insurance and the impact of their decisions on product pricing, expenses and Broker commissions.
- Knowledge of the Financial Service Reform Act and its practical implications for Brokers.

Internal contacts

Sales & Marketing; Underwriting.

External contacts

Brokers; Clients.

Typical experience

5+ years experience in financial services coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Associate Account Executive Commercial - Small Accounts**
Position code:	**FININS.RM.AECS.2**
Level:	**2**

Responsible for

Providing assistance to Account Executive(s) and/or Senior Account Executives, in all aspects of client service.. Primarily works with existing accounts.

Report to

Senior Account Executive / Account Manager

Supervises

No supervisory responsibilities.

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Account Executive or Senior Account Executive within determined parameters.
- Liaising with clients & insurers and addressing any basic enquiries raised.
- Actively seeking opportunities to improve internal business processes.Gathering relevant client information and identifying key issues to give assistance in negotiations.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Basic computer literacy.
- Ability to take instructions and work under pressure.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Entry Level Broker, Account Executives, Senior Account Executives, Account Manager

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1-2 years insurance industry experience. May possess tertiary qualifications and / or is completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Head of Account Employee Benefits**
Position code:	**FININS.RM.AEEB.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility. Primarily works with existing accounts

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches.
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress.
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes.
- Support the development and delivery of the annual business plan, budgets and initiatives.
- Ongoing portfolio review and monitoring in line with strategies.
- Act as a technical expert to support the identification of issues.
- Lead, coach and mentor staff, providing technical expertise and guidance.

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage.
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Account Director Employee Benefits - Large Accounts**
Position code:	**FININS.RM.AEEL.6**
Level:	**6**

Responsible for

Managing a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Management

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Management and leadership experience
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets

Key skills

- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Strong presentation skills.

Internal contacts

Account Managers, Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Account Manager Employee Benefits - Large Accounts**
Position code:	**FININS.RM.AEEL.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Senior Account Executive Employee Benefits - Large Accounts**
Position code:	**FININS.RM.AEEL.4**
Level:	**4**

Responsible for

Managing the companies range of services and front line customer service in respect to accounts allocated by the account manager, ensuring high quality customer service while coordinating, managing and developing Assistant Account Executives, Account Executives and Administrative staff.. Primarily works with existing accounts.

Report to

Account Manager

Supervises

Assistant Account Executives, Account Executives, Administration Staff.

Main activities

- Managing long term relationships with key clients who are actively involved with the organisation's insurance products, services and solutions.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies.
- Investigating and pursuing new business opportunities in conjunction with account manager.
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.
- Ensuring compliance of systems and processes with the Financial Services Reform Act and other relevant legislation.
- Managing daily client enquiries.
- Managing expenses by meeting income budgets and processing invoices in a timely fashion.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching an mentoring skills.

Internal contacts

Account Manager, Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects, Underwriters, external specialists such as Industry Bodies, Loss Adjusters and Solicitors.

Typical experience

5+ years insurance industry experience with at least 2 years experience in a accounts management role. Tertiary qualifications coupled with Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Executive Employee Benefits - Large Accounts**
Position code:	**FININS.RM.AEEL.3**
Level:	**3**

Responsible for

Managing relationships at both a strategic and tactical level with Brokers to maximise the growth in net underwriting profit for the organisation.. Primarily works with existing accounts.

Report to

Area/Regional Sales Manager

Supervises

No supervisory responsibilities.

Main activities

- Managing the marketing and implementation of business initiatives to Brokers.
- Understanding the business objectives of Brokers and working with them to increase the sales of the organisation's products to deliver value for the Broker and the organisation.
- Making decisions within accreditation level on the exceptions to claims and underwriting issues that are referred by the service centre and mobile teams, or where these are beyond their accreditation, facilitate the decision making by accredited specialists.
- Establishing and developing relationships with Brokers. Monitoring key performance indicators for his/her Brokers to ensure key result areas are achieved.
- Providing advice on product features and benefits to Brokers and facilitating the provision of technical or other specialist underwriting and product advice to Brokers.
- Maintaining records for his/her group of Brokers in the organisation's database, ensuring accuracy and completeness at all times.
- Directing Brokers' queries on underwriting decisions to the appropriate underwriting authority.

Key skills

- Capacity to establish and foster relationships with Clients in order to realise mutual benefits.
- Familiar with a wide range of Brokers operations ranging from national Broker groups to independent owner operated businesses, including financial, operational and people elements.
- Knowledge of claims and underwriting processes and ability to analyse issues and make decisions, involving specialist teams to achieve the best results for the organisation and its Brokers.
- Knowledge of the financial and business drivers of performance in general insurance and the impact of their decisions on product pricing, expenses and Broker commissions.
- Knowledge of the Financial Service Reform Act and its practical implications for Brokers.

Internal contacts

Sales & Marketing; Underwriting.

External contacts

Brokers; Clients.

Typical experience

5+ years experience in financial services coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Associate Account Executive Employee Benefits - Large Accounts**
Position code:	**FININS.RM.AEEL.2**
Level:	**2**

Responsible for

Providing assistance to Account Executive(s) and/or Senior Account Executives, in all aspects of client service.. Primarily works with existing accounts.

Report to

Senior Account Executive / Account Manager

Supervises

No supervisory responsibilities.

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Account Executive or Senior Account Executive within determined parameters.
- Liaising with clients & insurers and addressing any basic enquiries raised.
- Actively seeking opportunities to improve internal business processes.Gathering relevant client information and identifying key issues to give assistance in negotiations.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Basic computer literacy.
- Ability to take instructions and work under pressure.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Entry Level Broker, Account Executives, Senior Account Executives, Account Manager

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1-2 years insurance industry experience. May possess tertiary qualifications and / or is completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Director Employee Benefits - Mid-sized Accounts**
Position code:	**FININS.RM.AEEM.6**
Level:	**6**

Responsible for

Managing a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Management

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Management and leadership experience
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets

Key skills

- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Strong presentation skills.

Internal contacts

Account Managers, Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Account Manager Employee Benefits - Mid-sized Accounts**
Position code:	**FININS.RM.AEEM.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Senior Account Executive Employee Benefits - Mid-sized Accounts**
Position code:	**FININS.RM.AEEM.4**
Level:	**4**

Responsible for

Managing the companies range of services and front line customer service in respect to accounts allocated by the account manager, ensuring high quality customer service while coordinating, managing and developing Assistant Account Executives, Account Executives and Administrative staff.. Primarily works with existing accounts.

Report to

Account Manager

Supervises

Assistant Account Executives, Account Executives, Administration Staff.

Main activities

- Managing long term relationships with key clients who are actively involved with the organisation's insurance products, services and solutions.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies.
- Investigating and pursuing new business opportunities in conjunction with account manager.
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.
- Ensuring compliance of systems and processes with the Financial Services Reform Act and other relevant legislation.
- Managing daily client enquiries.
- Managing expenses by meeting income budgets and processing invoices in a timely fashion.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching an mentoring skills.

Internal contacts

Account Manager, Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects, Underwriters, external specialists such as Industry Bodies, Loss Adjusters and Solicitors.

Typical experience

5+ years insurance industry experience with at least 2 years experience in a accounts management role. Tertiary qualifications coupled with Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Executive Employee Benefits - Mid-sized Accounts**
Position code:	**FININS.RM.AEEM.3**
Level:	**3**

Responsible for

Managing relationships at both a strategic and tactical level with Brokers to maximise the growth in net underwriting profit for the organisation.. Primarily works with existing accounts.

Report to

Area/Regional Sales Manager

Supervises

No supervisory responsibilities.

Main activities

- Managing the marketing and implementation of business initiatives to Brokers.
- Understanding the business objectives of Brokers and working with them to increase the sales of the organisation's products to deliver value for the Broker and the organisation.
- Making decisions within accreditation level on the exceptions to claims and underwriting issues that are referred by the service centre and mobile teams, or where these are beyond their accreditation, facilitate the decision making by accredited specialists.
- Establishing and developing relationships with Brokers. Monitoring key performance indicators for his/her Brokers to ensure key result areas are achieved.
- Providing advice on product features and benefits to Brokers and facilitating the provision of technical or other specialist underwriting and product advice to Brokers.
- Maintaining records for his/her group of Brokers in the organisation's database, ensuring accuracy and completeness at all times.
- Directing Brokers' queries on underwriting decisions to the appropriate underwriting authority.

Key skills

- Capacity to establish and foster relationships with Clients in order to realise mutual benefits.
- Familiar with a wide range of Brokers operations ranging from national Broker groups to independent owner operated businesses, including financial, operational and people elements.
- Knowledge of claims and underwriting processes and ability to analyse issues and make decisions, involving specialist teams to achieve the best results for the organisation and its Brokers.
- Knowledge of the financial and business drivers of performance in general insurance and the impact of their decisions on product pricing, expenses and Broker commissions.
- Knowledge of the Financial Service Reform Act and its practical implications for Brokers.

Internal contacts

Sales & Marketing; Underwriting.

External contacts

Brokers; Clients.

Typical experience

5+ years experience in financial services coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Associate Account Executive Employee Benefits - Mid-sized Accounts**
Position code:	**FININS.RM.AEEM.2**
Level:	**2**

Responsible for

Providing assistance to Account Executive(s) and/or Senior Account Executives, in all aspects of client service.. Primarily works with existing accounts.

Report to

Senior Account Executive / Account Manager

Supervises

No supervisory responsibilities.

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Account Executive or Senior Account Executive within determined parameters.
- Liaising with clients & insurers and addressing any basic enquiries raised.
- Actively seeking opportunities to improve internal business processes.Gathering relevant client information and identifying key issues to give assistance in negotiations.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Basic computer literacy.
- Ability to take instructions and work under pressure.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Entry Level Broker, Account Executives, Senior Account Executives, Account Manager

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1-2 years insurance industry experience. May possess tertiary qualifications and / or is completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Director Employee Benefits - Small Accounts**
Position code:	**FININS.RM.AEES.6**
Level:	**6**

Responsible for

Managing a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Management

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Management and leadership experience
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets

Key skills

- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Strong presentation skills.

Internal contacts

Account Managers, Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Account Manager Employee Benefits - Small Accounts**
Position code:	**FININS.RM.AEES.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Senior Account Executive Employee Benefits - Small Accounts**
Position code:	**FININS.RM.AEES.4**
Level:	**4**

Responsible for

Managing the companies range of services and front line customer service in respect to accounts allocated by the account manager, ensuring high quality customer service while coordinating, managing and developing Assistant Account Executives, Account Executives and Administrative staff.. Primarily works with existing accounts.

Report to

Account Manager

Supervises

Assistant Account Executives, Account Executives, Administration Staff.

Main activities

- Managing long term relationships with key clients who are actively involved with the organisation's insurance products, services and solutions.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies.
- Investigating and pursuing new business opportunities in conjunction with account manager.
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.
- Ensuring compliance of systems and processes with the Financial Services Reform Act and other relevant legislation.
- Managing daily client enquiries.
- Managing expenses by meeting income budgets and processing invoices in a timely fashion.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching an mentoring skills.

Internal contacts

Account Manager, Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects, Underwriters, external specialists such as Industry Bodies, Loss Adjusters and Solicitors.

Typical experience

5+ years insurance industry experience with at least 2 years experience in a accounts management role. Tertiary qualifications coupled with Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Executive Employee Benefits - Small Accounts**
Position code:	**FININS.RM.AEES.3**
Level:	**3**

Responsible for

Managing relationships at both a strategic and tactical level with Brokers to maximise the growth in net underwriting profit for the organisation.. Primarily works with existing accounts.

Report to

Area/Regional Sales Manager

Supervises

No supervisory responsibilities.

Main activities

- Managing the marketing and implementation of business initiatives to Brokers.
- Understanding the business objectives of Brokers and working with them to increase the sales of the organisation's products to deliver value for the Broker and the organisation.
- Making decisions within accreditation level on the exceptions to claims and underwriting issues that are referred by the service centre and mobile teams, or where these are beyond their accreditation, facilitate the decision making by accredited specialists.
- Establishing and developing relationships with Brokers. Monitoring key performance indicators for his/her Brokers to ensure key result areas are achieved.
- Providing advice on product features and benefits to Brokers and facilitating the provision of technical or other specialist underwriting and product advice to Brokers.
- Maintaining records for his/her group of Brokers in the organisation's database, ensuring accuracy and completeness at all times.
- Directing Brokers' queries on underwriting decisions to the appropriate underwriting authority.

Key skills

- Capacity to establish and foster relationships with Clients in order to realise mutual benefits.
- Familiar with a wide range of Brokers operations ranging from national Broker groups to independent owner operated businesses, including financial, operational and people elements.
- Knowledge of claims and underwriting processes and ability to analyse issues and make decisions, involving specialist teams to achieve the best results for the organisation and its Brokers.
- Knowledge of the financial and business drivers of performance in general insurance and the impact of their decisions on product pricing, expenses and Broker commissions.
- Knowledge of the Financial Service Reform Act and its practical implications for Brokers.

Internal contacts

Sales & Marketing; Underwriting.

External contacts

Brokers; Clients.

Typical experience

5+ years experience in financial services coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Associate Account Executive Employee Benefits - Small Accounts**
Position code:	**FININS.RM.AEES.2**
Level:	**2**

Responsible for

Providing assistance to Account Executive(s) and/or Senior Account Executives, in all aspects of client service.. Primarily works with existing accounts.

Report to

Senior Account Executive / Account Manager

Supervises

No supervisory responsibilities.

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Account Executive or Senior Account Executive within determined parameters.
- Liaising with clients & insurers and addressing any basic enquiries raised.
- Actively seeking opportunities to improve internal business processes.Gathering relevant client information and identifying key issues to give assistance in negotiations.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Basic computer literacy.
- Ability to take instructions and work under pressure.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Entry Level Broker, Account Executives, Senior Account Executives, Account Manager

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1-2 years insurance industry experience. May possess tertiary qualifications and / or is completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Head of Account Personal Lines**
Position code:	**FININS.RM.AEPL.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility. Primarily works with existing accounts

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches.
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress.
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes.
- Support the development and delivery of the annual business plan, budgets and initiatives.
- Ongoing portfolio review and monitoring in line with strategies.
- Act as a technical expert to support the identification of issues.
- Lead, coach and mentor staff, providing technical expertise and guidance.

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage.
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Account Director Personal Lines**
Position code:	**FININS.RM.AEPL.6**
Level:	**6**

Responsible for

Managing a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Management

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Management and leadership experience
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets

Key skills

- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Strong presentation skills.

Internal contacts

Account Managers, Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Account Manager Personal Lines**
Position code:	**FININS.RM.AEPL.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Senior Account Executive Personal Lines**
Position code:	**FININS.RM.AEPL.4**
Level:	**4**

Responsible for

Managing the companies range of services and front line customer service in respect to accounts allocated by the account manager, ensuring high quality customer service while coordinating, managing and developing Assistant Account Executives, Account Executives and Administrative staff.. Primarily works with existing accounts.

Report to

Account Manager

Supervises

Assistant Account Executives, Account Executives, Administration Staff.

Main activities

- Managing long term relationships with key clients who are actively involved with the organisation's insurance products, services and solutions.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies.
- Investigating and pursuing new business opportunities in conjunction with account manager.
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.
- Ensuring compliance of systems and processes with the Financial Services Reform Act and other relevant legislation.
- Managing daily client enquiries.
- Managing expenses by meeting income budgets and processing invoices in a timely fashion.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching an mentoring skills.

Internal contacts

Account Manager, Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects, Underwriters, external specialists such as Industry Bodies, Loss Adjusters and Solicitors.

Typical experience

5+ years insurance industry experience with at least 2 years experience in a accounts management role. Tertiary qualifications coupled with Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Executive Personal Lines**
Position code:	**FININS.RM.AEPL.3**
Level:	**3**

Responsible for

Managing relationships at both a strategic and tactical level with Brokers to maximise the growth in net underwriting profit for the organisation.. Primarily works with existing accounts.

Report to

Area/Regional Sales Manager

Supervises

No supervisory responsibilities.

Main activities

- Managing the marketing and implementation of business initiatives to Brokers.
- Understanding the business objectives of Brokers and working with them to increase the sales of the organisation's products to deliver value for the Broker and the organisation.
- Making decisions within accreditation level on the exceptions to claims and underwriting issues that are referred by the service centre and mobile teams, or where these are beyond their accreditation, facilitate the decision making by accredited specialists.
- Establishing and developing relationships with Brokers. Monitoring key performance indicators for his/her Brokers to ensure key result areas are achieved.
- Providing advice on product features and benefits to Brokers and facilitating the provision of technical or other specialist underwriting and product advice to Brokers.
- Maintaining records for his/her group of Brokers in the organisation's database, ensuring accuracy and completeness at all times.
- Directing Brokers' queries on underwriting decisions to the appropriate underwriting authority.

Key skills

- Capacity to establish and foster relationships with Clients in order to realise mutual benefits.
- Familiar with a wide range of Brokers operations ranging from national Broker groups to independent owner operated businesses, including financial, operational and people elements.
- Knowledge of claims and underwriting processes and ability to analyse issues and make decisions, involving specialist teams to achieve the best results for the organisation and its Brokers.
- Knowledge of the financial and business drivers of performance in general insurance and the impact of their decisions on product pricing, expenses and Broker commissions.
- Knowledge of the Financial Service Reform Act and its practical implications for Brokers.

Internal contacts

Sales & Marketing; Underwriting.

External contacts

Brokers; Clients.

Typical experience

5+ years experience in financial services coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Associate Account Executive Personal Lines**
Position code:	**FININS.RM.AEPL.2**
Level:	**2**

Responsible for

Providing assistance to Account Executive(s) and/or Senior Account Executives, in all aspects of client service.. Primarily works with existing accounts.

Report to

Senior Account Executive / Account Manager

Supervises

No supervisory responsibilities.

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Account Executive or Senior Account Executive within determined parameters.
- Liaising with clients & insurers and addressing any basic enquiries raised.
- Actively seeking opportunities to improve internal business processes.Gathering relevant client information and identifying key issues to give assistance in negotiations.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Basic computer literacy.
- Ability to take instructions and work under pressure.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Entry Level Broker, Account Executives, Senior Account Executives, Account Manager

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1-2 years insurance industry experience. May possess tertiary qualifications and / or is completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Head of Account Multi-Focus**
Position code:	**FININS.RM.AEMF.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility. Primarily works with existing accounts

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches.
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress.
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes.
- Support the development and delivery of the annual business plan, budgets and initiatives.
- Ongoing portfolio review and monitoring in line with strategies.
- Act as a technical expert to support the identification of issues.
- Lead, coach and mentor staff, providing technical expertise and guidance.

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage.
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Account Director Multi-Focus**
Position code:	**FININS.RM.AEMF.6**
Level:	**6**

Responsible for

Managing a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Management

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Management and leadership experience
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets

Key skills

- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Strong presentation skills.

Internal contacts

Account Managers, Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Account Manager Multi-Focus**
Position code:	**FININS.RM.AEMF.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Senior Account Executive Multi-Focus**
Position code:	**FININS.RM.AEMF.4**
Level:	**4**

Responsible for

Managing the companies range of services and front line customer service in respect to accounts allocated by the account manager, ensuring high quality customer service while coordinating, managing and developing Assistant Account Executives, Account Executives and Administrative staff.. Primarily works with existing accounts.

Report to

Account Manager

Supervises

Assistant Account Executives, Account Executives, Administration Staff.

Main activities

- Managing long term relationships with key clients who are actively involved with the organisation's insurance products, services and solutions.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies.
- Investigating and pursuing new business opportunities in conjunction with account manager.
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.
- Ensuring compliance of systems and processes with the Financial Services Reform Act and other relevant legislation.
- Managing daily client enquiries.
- Managing expenses by meeting income budgets and processing invoices in a timely fashion.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching an mentoring skills.

Internal contacts

Account Manager, Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects, Underwriters, external specialists such as Industry Bodies, Loss Adjusters and Solicitors.

Typical experience

5+ years insurance industry experience with at least 2 years experience in a accounts management role. Tertiary qualifications coupled with Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Executive Multi-Focus**
Position code:	**FININS.RM.AEMF.3**
Level:	**3**

Responsible for

Managing relationships at both a strategic and tactical level with Brokers to maximise the growth in net underwriting profit for the organisation.. Primarily works with existing accounts.

Report to

Area/Regional Sales Manager

Supervises

No supervisory responsibilities.

Main activities

- Managing the marketing and implementation of business initiatives to Brokers.
- Understanding the business objectives of Brokers and working with them to increase the sales of the organisation's products to deliver value for the Broker and the organisation.
- Making decisions within accreditation level on the exceptions to claims and underwriting issues that are referred by the service centre and mobile teams, or where these are beyond their accreditation, facilitate the decision making by accredited specialists.
- Establishing and developing relationships with Brokers. Monitoring key performance indicators for his/her Brokers to ensure key result areas are achieved.
- Providing advice on product features and benefits to Brokers and facilitating the provision of technical or other specialist underwriting and product advice to Brokers.
- Maintaining records for his/her group of Brokers in the organisation's database, ensuring accuracy and completeness at all times.
- Directing Brokers' queries on underwriting decisions to the appropriate underwriting authority.

Key skills

- Capacity to establish and foster relationships with Clients in order to realise mutual benefits.
- Familiar with a wide range of Brokers operations ranging from national Broker groups to independent owner operated businesses, including financial, operational and people elements.
- Knowledge of claims and underwriting processes and ability to analyse issues and make decisions, involving specialist teams to achieve the best results for the organisation and its Brokers.
- Knowledge of the financial and business drivers of performance in general insurance and the impact of their decisions on product pricing, expenses and Broker commissions.
- Knowledge of the Financial Service Reform Act and its practical implications for Brokers.

Internal contacts

Sales & Marketing; Underwriting.

External contacts

Brokers; Clients.

Typical experience

5+ years experience in financial services coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Associate Account Executive Multi-Focus**
Position code:	**FININS.RM.AEMF.2**
Level:	**2**

Responsible for

Providing assistance to Account Executive(s) and/or Senior Account Executives, in all aspects of client service.. Primarily works with existing accounts.

Report to

Senior Account Executive / Account Manager

Supervises

No supervisory responsibilities.

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Account Executive or Senior Account Executive within determined parameters.
- Liaising with clients & insurers and addressing any basic enquiries raised.
- Actively seeking opportunities to improve internal business processes.Gathering relevant client information and identifying key issues to give assistance in negotiations.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Basic computer literacy.
- Ability to take instructions and work under pressure.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Entry Level Broker, Account Executives, Senior Account Executives, Account Manager

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1-2 years insurance industry experience. May possess tertiary qualifications and / or is completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Executive - Combined - Level 7**
Position code:	**FININS.RM.AE00.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility. Primarily works with existing accounts

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches.
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress.
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes.
- Support the development and delivery of the annual business plan, budgets and initiatives.
- Ongoing portfolio review and monitoring in line with strategies.
- Act as a technical expert to support the identification of issues.
- Lead, coach and mentor staff, providing technical expertise and guidance.

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Account Executive - Combined - Level 6**
Position code:	**FININS.RM.AE00.6**
Level:	**6**

Responsible for

Managing a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Management

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Management and leadership experience
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets

Key skills

- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Strong presentation skills.

Internal contacts

Account Managers, Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Account Executive - Combined - Level 5**
Position code:	**FININS.RM.AE00.5**
Level:	**5**

Responsible for

Maintaining a portfolio of key revenue generating accounts, ensuring a high degree of quality customer service is provided to all clients.. Primarily works with existing accounts.

Report to

Divisional Manager

Supervises

Senior Account Executives, Account Executives, Assistant Account Executives Administration support staff.

Main activities

- Managing the relationship development and coordination of product and service solutions specific to a group of accounts.
- Providing clear and accurate delegation of key activities to senior account executives.
- Recruiting, attracting, managing / mentoring and retaining and develop employees for the organisation.
- Leading, planning and implementing clear and effective renewal and broking strategies.
- Ensuring that effective account retention and defence strategies are in place for all clients at all times to promote client retention.
- Maintaining an active and direct involvement in all claim related matters.
- Developing and maintaining meaningful working relationships with insurers at a senior level.
- Assisting account executives and claims personnel in the negotiation of equitable claim settlements on behalf of clients.
- Keeping self and staff informed of relevant professional, regulatory and legislative changes affecting business services.
- Actively developing additional business from existing portfolio in line with budget targets while managing income and expense budgets.

Key skills

- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Ability to direct and develop subordinate capabilities to achieve set tasks and outcomes.
- Ability to efficiently coordinate, delegate and direct resources, including staff, external consultants, time and project budgets to achieve set tasks and outcomes.
- Ability to development and maintain effective long-term relationships with potential clients.
- Ability to identify and develop new business opportunities.
- Highly developed communications skills both written and verbal.
- Basic computer literacy skills.
- Strong presentation skills.

Internal contacts

Senior Account Executives, Account Executives, Principle Brokers.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. Must hold relevant industry certification as a Qualified Practicing Insurance Broker or equivalent coupled with relevant tertiary and/or postgraduate qualifications

Other comments

Position Description

Position title:	**Account Executive - Combined - Level 4**
Position code:	**FININS.RM.AE00.4**
Level:	**4**

Responsible for

Managing the companies range of services and front line customer service in respect to accounts allocated by the account manager, ensuring high quality customer service while coordinating, managing and developing Assistant Account Executives, Account Executives and Administrative staff.. Primarily works with existing accounts.

Report to

Account Manager

Supervises

Assistant Account Executives, Account Executives, Administration Staff.

Main activities

- Managing long term relationships with key clients who are actively involved with the organisation's insurance products, services and solutions.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies.
- Investigating and pursuing new business opportunities in conjunction with account manager.
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.
- Ensuring compliance of systems and processes with the Financial Services Reform Act and other relevant legislation.
- Managing daily client enquiries.
- Managing expenses by meeting income budgets and processing invoices in a timely fashion.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Basic computer literacy skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching an mentoring skills.

Internal contacts

Account Manager, Account Executives, Assistant Account Executives.

External contacts

Clients, Insurers, New Business Prospects, Underwriters, external specialists such as Industry Bodies, Loss Adjusters and Solicitors.

Typical experience

5+ years insurance industry experience with at least 2 years experience in a accounts management role. Tertiary qualifications coupled with Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Account Executive - Combined - Level 3**
Position code:	**FININS.RM.AE00.3**
Level:	**3**

Responsible for

Managing relationships at both a strategic and tactical level with Brokers to maximise the growth in net underwriting profit for the organisation.. Primarily works with existing accounts.

Report to

Area/Regional Sales Manager

Supervises

No supervisory responsibilities.

Main activities

- Managing the marketing and implementation of business initiatives to Brokers.
- Understanding the business objectives of Brokers and working with them to increase the sales of the organisation's products to deliver value for the Broker and the organisation.
- Making decisions within accreditation level on the exceptions to claims and underwriting issues that are referred by the service centre and mobile teams, or where these are beyond their accreditation, facilitate the decision making by accredited specialists.
- Establishing and developing relationships with Brokers. Monitoring key performance indicators for his/her Brokers to ensure key result areas are achieved.
- Providing advice on product features and benefits to Brokers and facilitating the provision of technical or other specialist underwriting and product advice to Brokers.
- Maintaining records for his/her group of Brokers in the organisation's database, ensuring accuracy and completeness at all times.
- Directing Brokers’ queries on underwriting decisions to the appropriate underwriting authority.

Key skills

- Capacity to establish and foster relationships with Clients in order to realise mutual benefits.
- Familiar with a wide range of Brokers operations ranging from national Broker groups to independent owner operated businesses, including financial, operational and people elements.
- Knowledge of claims and underwriting processes and ability to analyse issues and make decisions, involving specialist teams to achieve the best results for the organisation and its Brokers.
- Knowledge of the financial and business drivers of performance in general insurance and the impact of their decisions on product pricing, expenses and Broker commissions.
- Knowledge of the Financial Service Reform Act and its practical implications for Brokers.

Internal contacts

Sales & Marketing; Underwriting.

External contacts

Brokers; Clients.

Typical experience

5+ years experience in financial services coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Account Executive - Combined - Level 2**
Position code:	**FININS.RM.AE00.2**
Level:	**2**

Responsible for

Providing assistance to Account Executive(s) and/or Senior Account Executives, in all aspects of client service.. Primarily works with existing accounts.

Report to

Senior Account Executive / Account Manager

Supervises

No supervisory responsibilities.

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Account Executive or Senior Account Executive within determined parameters.
- Liaising with clients & insurers and addressing any basic enquiries raised.
- Actively seeking opportunities to improve internal business processes.Gathering relevant client information and identifying key issues to give assistance in negotiations.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Basic computer literacy.
- Ability to take instructions and work under pressure.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Entry Level Broker, Account Executives, Senior Account Executives, Account Manager

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1-2 years insurance industry experience. May possess tertiary qualifications and / or is completing a Diploma of Financial Services Accreditation.

Other comments

Position Description

Position title:	**Regional Head Commercial - Large Accounts**
Position code:	**FININS.SA.PSCL.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility.. Primarily works with generation of new business/new accounts.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Branch Manager Commercial - Large Accounts**
Position code:	**FININS.SA.PSCL.6**
Level:	**6**

Responsible for

Managing a branch operating separately as an autonomous profit centre.. Primarily works with generation of new business/new accounts.

Report to

Chief Executive Officer, Chief Operations Officer, Regional Manager.

Supervises

All staff within the Branch

Main activities

- Providing strategic direction, leading, managing and directing all operational activities of the branch
- Leading preparation, management, implementation and achievement of business plans and goals.
- Accountability for the overall profitability of the operational activities of the branch.
- Managing and motivating all branch staff.
- Identifying and capitalising on new business opportunities, which may include potential acquisitions.
- Creating a high performance sales culture by leading, developing and coaching Broking staff.
- Utilising local business networks to represent the organisation and generate new business.

Key skills

- Proven management experience at a senior level.
- Financial management/reporting and analysis skills.
- Strategic planning and resource management skills.
- Strong leadership and motivational ability.
- Superior client relationship management skills.
- Broad knowledge of insurance industry.
- Proven sales skills.

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10+ years relevant management and operational experience coupled with tertiary level qualifications.

Other comments

Position Description

Position title:	**Producer Sales Manager Commercial - Large Accounts**
Position code:	**FININS.SA.VPCL.5**
Level:	**5**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Senior Broker Commercial - Large Accounts**
Position code:	**FININS.SA.VPCL.4**
Level:	**4**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

5-7 years insurance industry experience years of experience. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Producer/Broker Commercial - Large Accounts**
Position code:	**FININS.SA.VPCL.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Branch Manager, ensuring high quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager - Broker Sales, Producer Sales Managers, Senior Brokers

Supervises

No supervisory responsibilities

Main activities

- Managing and growing a portfolio of client accounts.
- Providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Brokers while liaising with claims staff to ensure client interests are protected.
- Ensuring the completion of activities delegated by Branch Manager or Senior Broker within determined parameters.
- Assisting Branch Manager/ Senior Brokers with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes with relevant legislation.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting with the development and training of Assistant Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Broad knowledge of insurance industry.
- Good customer service skills.
- Strong organisational and written / verbal communication skills.

Internal contacts

Branch Manager, Senior Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

2-4 years insurance industry experience. May have tertiary qualifications or relevant industry qualification.

Other comments

Position Description

Position title:	**Associate Broker Commercial - Large Accounts**
Position code:	**FININS.SA.VPCL.2**
Level:	**2**

Responsible for

Providing assistance to Brokers and/or Senior Brokers, in all aspects of client service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager/Senior Broker.

Supervises

No supervisory responsibilities

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Broker or Senior Broker within determined parameters.
- Liaising with clients and insurers and addressing any basic enquiries raised.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Developing customer service skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Strong administrative, numeracy & analytical skills.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Branch Manager, Senior Brokers, Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1 year insurance industry experience desirable. May possess tertiary qualifications and / or relevant industry qualification.

Other comments

Position Description

Position title:	**Regional Head - Commercial Mid-Sized Accounts**
Position code:	**FININS.SA.PSCM.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility.. Primarily works with generation of new business/new accounts.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Branch Manager - Commercial Mid-Sized Accounts**
Position code:	**FININS.SA.PSCM.6**
Level:	**6**

Responsible for
Managing a branch operating separately as an autonomous profit centre.. Primarily works with generation of new business/new accounts.

Report to
Chief Executive Officer, Chief Operations Officer, Regional Manager.

Supervises
All staff within the Branch

Main activities
- Providing strategic direction, leading, managing and directing all operational activities of the branch
- Leading preparation, management, implementation and achievement of business plans and goals.
- Accountability for the overall profitability of the operational activities of the branch.
- Managing and motivating all branch staff.
- Identifying and capitalising on new business opportunities, which may include potential acquisitions.
- Creating a high performance sales culture by leading, developing and coaching Broking staff.
- Utilising local business networks to represent the organisation and generate new business.

Key skills
- Proven management experience at a senior level.
- Financial management/reporting and analysis skills.
- Strategic planning and resource management skills.
- Strong leadership and motivational ability.
- Superior client relationship management skills.
- Broad knowledge of insurance industry.
- Proven sales skills.

Internal contacts
Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts
Clients, Insurers, New Business Prospects.

Typical experience
At least 10+ years relevant management and operational experience coupled with tertiary level qualifications.

Other comments

Position Description

Position title:	**Producer Sales Manager Commercial - Mid-Sized Accounts**
Position code:	**FININS.SA.VPCM.5**
Level:	**5**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Senior Broker Commercial - Mid-Sized Accounts**
Position code:	**FININS.SA.VPCM.4**
Level:	**4**

Responsible for
Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to
Branch Manager.

Supervises
Brokers, Associate Brokers, Broker Support staff.

Main activities
- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills
- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts
Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts
Clients, Insurers, New Business Prospects.

Typical experience
5-7 years insurance industry experience years of experience. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Producer/Broker Commercial - Mid-Sized Accounts**
Position code:	**FININS.SA.VPCM.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Branch Manager, ensuring high quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager - Broker Sales, Producer Sales Managers, Senior Brokers

Supervises

No supervisory responsibilities

Main activities

- Managing and growing a portfolio of client accounts.
- Providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Brokers while liaising with claims staff to ensure client interests are protected.
- Ensuring the completion of activities delegated by Branch Manager or Senior Broker within determined parameters.
- Assisting Branch Manager/ Senior Brokers with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes with relevant legislation.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting with the development and training of Assistant Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Broad knowledge of insurance industry.
- Good customer service skills.
- Strong organisational and written / verbal communication skills.

Internal contacts

Branch Manager, Senior Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

2-4 years insurance industry experience. May have tertiary qualifications or relevant industry qualification.

Other comments

Position Description

Position title:	**Associate Broker Commercial - Mid-Sized Accounts**
Position code:	**FININS.SA.VPCM.2**
Level:	**2**

Responsible for

Providing assistance to Brokers and/or Senior Brokers, in all aspects of client service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager/Senior Broker.

Supervises

No supervisory responsibilities

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Broker or Senior Broker within determined parameters.
- Liaising with clients and insurers and addressing any basic enquiries raised.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Developing customer service skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Strong administrative, numeracy & analytical skills.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Branch Manager, Senior Brokers, Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1 year insurance industry experience desirable. May possess tertiary qualifications and / or relevant industry qualification.

Other comments

Position Description

Position title:	**Regional Head - Commercial Small Accounts**
Position code:	**FININS.SA.PSCS.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility.. Primarily works with generation of new business/new accounts.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Branch Manager - Commercial Small Accounts**
Position code:	**FININS.SA.PSCS.6**
Level:	**6**

Responsible for

Managing a branch operating separately as an autonomous profit centre.. Primarily works with generation of new business/new accounts.

Report to

Chief Executive Officer, Chief Operations Officer, Regional Manager.

Supervises

All staff within the Branch

Main activities

- Providing strategic direction, leading, managing and directing all operational activities of the branch
- Leading preparation, management, implementation and achievement of business plans and goals.
- Accountability for the overall profitability of the operational activities of the branch.
- Managing and motivating all branch staff.
- Identifying and capitalising on new business opportunities, which may include potential acquisitions.
- Creating a high performance sales culture by leading, developing and coaching Broking staff.
- Utilising local business networks to represent the organisation and generate new business.

Key skills

- Proven management experience at a senior level.
- Financial management/reporting and analysis skills.
- Strategic planning and resource management skills.
- Strong leadership and motivational ability.
- Superior client relationship management skills.
- Broad knowledge of insurance industry.
- Proven sales skills.

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10+ years relevant management and operational experience coupled with tertiary level qualifications.

Other comments

Position Description

Position title:	**Producer Sales Manager Commercial - Small Accounts**
Position code:	**FININS.SA.VPCS.5**
Level:	**5**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Senior Broker Commercial - Small Accounts**
Position code:	**FININS.SA.VPCS.4**
Level:	**4**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

5-7 years insurance industry experience years of experience. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Producer/Broker Commercial - Small Accounts**
Position code:	**FININS.SA.VPCS.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Branch Manager, ensuring high quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager - Broker Sales, Producer Sales Managers, Senior Brokers

Supervises

No supervisory responsibilities

Main activities

- Managing and growing a portfolio of client accounts.
- Providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Brokers while liaising with claims staff to ensure client interests are protected.
- Ensuring the completion of activities delegated by Branch Manager or Senior Broker within determined parameters.
- Assisting Branch Manager/ Senior Brokers with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes with relevant legislation.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting with the development and training of Assistant Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Broad knowledge of insurance industry.
- Good customer service skills.
- Strong organisational and written / verbal communication skills.

Internal contacts

Branch Manager, Senior Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

2-4 years insurance industry experience. May have tertiary qualifications or relevant industry qualification.

Other comments

Position Description

Position title:	**Associate Broker Commercial - Small Accounts**
Position code:	**FININS.SA.VPCS.2**
Level:	**2**

Responsible for

Providing assistance to Brokers and/or Senior Brokers, in all aspects of client service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager/Senior Broker.

Supervises

No supervisory responsibilities

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Broker or Senior Broker within determined parameters.
- Liaising with clients and insurers and addressing any basic enquiries raised.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Developing customer service skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Strong administrative, numeracy & analytical skills.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Branch Manager, Senior Brokers, Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1 year insurance industry experience desirable. May possess tertiary qualifications and / or relevant industry qualification.

Other comments

Position Description

Position title:	**Regional Head Employee Benefits - Large Accounts**
Position code:	**FININS.SA.PSEL.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility.. Primarily works with generation of new business/new accounts.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Branch Manager Employee Benefits - Large Accounts**
Position code:	**FININS.SA.PSEL.6**
Level:	**6**

Responsible for

Managing a branch operating separately as an autonomous profit centre.. Primarily works with generation of new business/new accounts.

Report to

Chief Executive Officer, Chief Operations Officer, Regional Manager.

Supervises

All staff within the Branch

Main activities

- Providing strategic direction, leading, managing and directing all operational activities of the branch
- Leading preparation, management, implementation and achievement of business plans and goals.
- Accountability for the overall profitability of the operational activities of the branch.
- Managing and motivating all branch staff.
- Identifying and capitalising on new business opportunities, which may include potential acquisitions.
- Creating a high performance sales culture by leading, developing and coaching Broking staff.
- Utilising local business networks to represent the organisation and generate new business.

Key skills

- Proven management experience at a senior level.
- Financial management/reporting and analysis skills.
- Strategic planning and resource management skills.
- Strong leadership and motivational ability.
- Superior client relationship management skills.
- Broad knowledge of insurance industry.
- Proven sales skills.

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10+ years relevant management and operational experience coupled with tertiary level qualifications.

Other comments

Position Description

Position title:	**Producer Sales Manager Employee Benefits - Large Accounts**
Position code:	**FININS.SA.VPEL.5**
Level:	**5**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Senior Broker Employee Benefits - Large Accounts**
Position code:	**FININS.SA.VPEL.4**
Level:	**4**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

5-7 years insurance industry experience years of experience. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Producer/Broker Employee Benefits - Large Accounts**
Position code:	**FININS.SA.VPEL.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Branch Manager, ensuring high quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager - Broker Sales, Producer Sales Managers, Senior Brokers

Supervises

No supervisory responsibilities

Main activities

- Managing and growing a portfolio of client accounts.
- Providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Brokers while liaising with claims staff to ensure client interests are protected.
- Ensuring the completion of activities delegated by Branch Manager or Senior Broker within determined parameters.
- Assisting Branch Manager/ Senior Brokers with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes with relevant legislation.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting with the development and training of Assistant Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Broad knowledge of insurance industry.
- Good customer service skills.
- Strong organisational and written / verbal communication skills.

Internal contacts

Branch Manager, Senior Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

2-4 years insurance industry experience. May have tertiary qualifications or relevant industry qualification.

Other comments

Position Description

Position title:	**Associate Broker Employee Benefits - Large Accounts**
Position code:	**FININS.SA.VPEL.2**
Level:	**2**

Responsible for

Providing assistance to Brokers and/or Senior Brokers, in all aspects of client service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager/Senior Broker.

Supervises

No supervisory responsibilities

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Broker or Senior Broker within determined parameters.
- Liaising with clients and insurers and addressing any basic enquiries raised.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Developing customer service skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Strong administrative, numeracy & analytical skills.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Branch Manager, Senior Brokers, Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1 year insurance industry experience desirable. May possess tertiary qualifications and / or relevant industry qualification.

Other comments

Position Description

Position title:	**Regional Head - Employee Benefits - Mid-Sized Accounts**
Position code:	**FININS.SA.PSEM.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility.. Primarily works with generation of new business/new accounts.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Branch Manager - Employee Benefits Mid-Sized Accounts**
Position code:	**FININS.SA.PSEM.6**
Level:	**6**

Responsible for

Managing a branch operating separately as an autonomous profit centre.. Primarily works with generation of new business/new accounts.

Report to

Chief Executive Officer, Chief Operations Officer, Regional Manager.

Supervises

All staff within the Branch

Main activities

- Providing strategic direction, leading, managing and directing all operational activities of the branch
- Leading preparation, management, implementation and achievement of business plans and goals.
- Accountability for the overall profitability of the operational activities of the branch.
- Managing and motivating all branch staff.
- Identifying and capitalising on new business opportunities, which may include potential acquisitions.
- Creating a high performance sales culture by leading, developing and coaching Broking staff.
- Utilising local business networks to represent the organisation and generate new business.

Key skills

- Proven management experience at a senior level.
- Financial management/reporting and analysis skills.
- Strategic planning and resource management skills.
- Strong leadership and motivational ability.
- Superior client relationship management skills.
- Broad knowledge of insurance industry.
- Proven sales skills.

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10+ years relevant management and operational experience coupled with tertiary level qualifications.

Other comments

Position Description

Position title:	**Producer Sales Manager Employee Benefits - Mid-sized Accounts**
Position code:	**FININS.SA.VPEM.5**
Level:	**5**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Senior Broker Employee Benefits - Mid-sized Accounts**
Position code:	**FININS.SA.VPEM.4**
Level:	**4**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

5-7 years insurance industry experience years of experience. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Producer/Broker Employee Benefits - Mid-sized Accounts**
Position code:	**FININS.SA.VPEM.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Branch Manager, ensuring high quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager - Broker Sales, Producer Sales Managers, Senior Brokers

Supervises

No supervisory responsibilities

Main activities

- Managing and growing a portfolio of client accounts.
- Providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Brokers while liaising with claims staff to ensure client interests are protected.
- Ensuring the completion of activities delegated by Branch Manager or Senior Broker within determined parameters.
- Assisting Branch Manager/ Senior Brokers with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes with relevant legislation.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting with the development and training of Assistant Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Broad knowledge of insurance industry.
- Good customer service skills.
- Strong organisational and written / verbal communication skills.

Internal contacts

Branch Manager, Senior Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

2-4 years insurance industry experience. May have tertiary qualifications or relevant industry qualification.

Other comments

Position Description

Position title:	**Associate Broker Employee Benefits - Mid-sized Accounts**
Position code:	**FININS.SA.VPEM.2**
Level:	**2**

Responsible for

Providing assistance to Brokers and/or Senior Brokers, in all aspects of client service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager/Senior Broker.

Supervises

No supervisory responsibilities

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Broker or Senior Broker within determined parameters.
- Liaising with clients and insurers and addressing any basic enquiries raised.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Developing customer service skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Strong administrative, numeracy & analytical skills.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Branch Manager, Senior Brokers, Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1 year insurance industry experience desirable. May possess tertiary qualifications and / or relevant industry qualification.

Other comments

Position Description

Position title:	**Regional Head - Employee Benefits - Small Accounts**
Position code:	**FININS.SA.PSES.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility.. Primarily works with generation of new business/new accounts.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Branch Manager - Employee Benefits Small Accounts**
Position code:	**FININS.SA.PSES.6**
Level:	**6**

Responsible for

Managing a branch operating separately as an autonomous profit centre.. Primarily works with generation of new business/new accounts.

Report to

Chief Executive Officer, Chief Operations Officer, Regional Manager.

Supervises

All staff within the Branch

Main activities

- Providing strategic direction, leading, managing and directing all operational activities of the branch
- Leading preparation, management, implementation and achievement of business plans and goals.
- Accountability for the overall profitability of the operational activities of the branch.
- Managing and motivating all branch staff.
- Identifying and capitalising on new business opportunities, which may include potential acquisitions.
- Creating a high performance sales culture by leading, developing and coaching Broking staff.
- Utilising local business networks to represent the organisation and generate new business.

Key skills

- Proven management experience at a senior level.
- Financial management/reporting and analysis skills.
- Strategic planning and resource management skills.
- Strong leadership and motivational ability.
- Superior client relationship management skills.
- Broad knowledge of insurance industry.
- Proven sales skills.

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10+ years relevant management and operational experience coupled with tertiary level qualifications.

Other comments

Position Description

Position title:	**Producer Sales Manager Employee Benefits - Small Accounts**
Position code:	**FININS.SA.VPES.5**
Level:	**5**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Senior Broker Employee Benefits - Small Accounts**
Position code:	**FININS.SA.VPES.4**
Level:	**4**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

5-7 years insurance industry experience years of experience. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Producer/Broker Employee Benefits - Small Accounts**
Position code:	**FININS.SA.VPES.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Branch Manager, ensuring high quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager - Broker Sales, Producer Sales Managers, Senior Brokers

Supervises

No supervisory responsibilities

Main activities

- Managing and growing a portfolio of client accounts.
- Providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Brokers while liaising with claims staff to ensure client interests are protected.
- Ensuring the completion of activities delegated by Branch Manager or Senior Broker within determined parameters.
- Assisting Branch Manager/ Senior Brokers with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes with relevant legislation.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting with the development and training of Assistant Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Broad knowledge of insurance industry.
- Good customer service skills.
- Strong organisational and written / verbal communication skills.

Internal contacts

Branch Manager, Senior Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

2-4 years insurance industry experience. May have tertiary qualifications or relevant industry qualification.

Other comments

Position Description

Position title:	**Associate Broker Employee Benefits - Small Accounts**
Position code:	**FININS.SA.VPES.2**
Level:	**2**

Responsible for

Providing assistance to Brokers and/or Senior Brokers, in all aspects of client service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager/Senior Broker.

Supervises

No supervisory responsibilities

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Broker or Senior Broker within determined parameters.
- Liaising with clients and insurers and addressing any basic enquiries raised.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Developing customer service skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Strong administrative, numeracy & analytical skills.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Branch Manager, Senior Brokers, Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1 year insurance industry experience desirable. May possess tertiary qualifications and / or relevant industry qualification.

Other comments

Position Description

Position title:	**Regional Head - Personal Lines**
Position code:	**FININS.SA.PSPL.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility.. Primarily works with generation of new business/new accounts.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Branch Manager - Personal Lines**
Position code:	**FININS.SA.PSPL.6**
Level:	**6**

Responsible for

Managing a branch operating separately as an autonomous profit centre.. Primarily works with generation of new business/new accounts.

Report to

Chief Executive Officer, Chief Operations Officer, Regional Manager.

Supervises

All staff within the Branch

Main activities

- Providing strategic direction, leading, managing and directing all operational activities of the branch
- Leading preparation, management, implementation and achievement of business plans and goals.
- Accountability for the overall profitability of the operational activities of the branch.
- Managing and motivating all branch staff.
- Identifying and capitalising on new business opportunities, which may include potential acquisitions.
- Creating a high performance sales culture by leading, developing and coaching Broking staff.
- Utilising local business networks to represent the organisation and generate new business.

Key skills

- Proven management experience at a senior level.
- Financial management/reporting and analysis skills.
- Strategic planning and resource management skills.
- Strong leadership and motivational ability.
- Superior client relationship management skills.
- Broad knowledge of insurance industry.
- Proven sales skills.

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10+ years relevant management and operational experience coupled with tertiary level qualifications.

Other comments

Position Description

Position title:	**Producer Sales Manager Personal Lines**
Position code:	**FININS.SA.VPPL.5**
Level:	**5**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Senior Broker Personal Lines**
Position code:	**FININS.SA.VPPL.4**
Level:	**4**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

5-7 years insurance industry experience years of experience. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Producer/Broker Personal Lines**
Position code:	**FININS.SA.VPPL.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Branch Manager, ensuring high quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager - Broker Sales, Producer Sales Managers, Senior Brokers

Supervises

No supervisory responsibilities

Main activities

- Managing and growing a portfolio of client accounts.
- Providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Brokers while liaising with claims staff to ensure client interests are protected.
- Ensuring the completion of activities delegated by Branch Manager or Senior Broker within determined parameters.
- Assisting Branch Manager/ Senior Brokers with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes with relevant legislation.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting with the development and training of Assistant Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Broad knowledge of insurance industry.
- Good customer service skills.
- Strong organisational and written / verbal communication skills.

Internal contacts

Branch Manager, Senior Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

2-4 years insurance industry experience. May have tertiary qualifications or relevant industry qualification.

Other comments

Position Description

Position title:	**Associate Broker Personal Lines**
Position code:	**FININS.SA.VPPL.2**
Level:	**2**

Responsible for

Providing assistance to Brokers and/or Senior Brokers, in all aspects of client service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager/Senior Broker.

Supervises

No supervisory responsibilities

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Broker or Senior Broker within determined parameters.
- Liaising with clients and insurers and addressing any basic enquiries raised.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Developing customer service skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Strong administrative, numeracy & analytical skills.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Branch Manager, Senior Brokers, Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1 year insurance industry experience desirable. May possess tertiary qualifications and / or relevant industry qualification.

Other comments

Position Description

Position title:	**Regional Head - Multi-Focus**
Position code:	**FININS.SA.PSMF.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility.. Primarily works with generation of new business/new accounts.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Branch Manager Multi-focus**
Position code:	**FININS.SA.PSMF.6**
Level:	**6**

Responsible for

Managing a branch operating separately as an autonomous profit centre.. Primarily works with generation of new business/new accounts.

Report to

Chief Executive Officer, Chief Operations Officer, Regional Manager.

Supervises

All staff within the Branch

Main activities

- Providing strategic direction, leading, managing and directing all operational activities of the branch
- Leading preparation, management, implementation and achievement of business plans and goals.
- Accountability for the overall profitability of the operational activities of the branch.
- Managing and motivating all branch staff.
- Identifying and capitalising on new business opportunities, which may include potential acquisitions.
- Creating a high performance sales culture by leading, developing and coaching Broking staff.
- Utilising local business networks to represent the organisation and generate new business.

Key skills

- Proven management experience at a senior level.
- Financial management/reporting and analysis skills.
- Strategic planning and resource management skills.
- Strong leadership and motivational ability.
- Superior client relationship management skills.
- Broad knowledge of insurance industry.
- Proven sales skills.

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10+ years relevant management and operational experience coupled with tertiary level qualifications.

Other comments

Position Description

Position title:	**Producer Sales Manager Multi-Focus**
Position code:	**FININS.SA.VPMF.5**
Level:	**5**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Senior Broker Multi-Focus**
Position code:	**FININS.SA.VPMF.4**
Level:	**4**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

5-7 years insurance industry experience years of experience. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Producer/Broker Multi-Focus**
Position code:	**FININS.SA.VPMF.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Branch Manager, ensuring high quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager - Broker Sales, Producer Sales Managers, Senior Brokers

Supervises

No supervisory responsibilities

Main activities

- Managing and growing a portfolio of client accounts.
- Providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Brokers while liaising with claims staff to ensure client interests are protected.
- Ensuring the completion of activities delegated by Branch Manager or Senior Broker within determined parameters.
- Assisting Branch Manager/ Senior Brokers with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes with relevant legislation.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting with the development and training of Assistant Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Broad knowledge of insurance industry.
- Good customer service skills.
- Strong organisational and written / verbal communication skills.

Internal contacts

Branch Manager, Senior Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

2-4 years insurance industry experience. May have tertiary qualifications or relevant industry qualification.

Other comments

Position Description

Position title:	**Associate Broker Multi-Focus**
Position code:	**FININS.SA.VPMF.2**
Level:	**2**

Responsible for

Providing assistance to Brokers and/or Senior Brokers, in all aspects of client service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager/Senior Broker.

Supervises

No supervisory responsibilities

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Broker or Senior Broker within determined parameters.
- Liaising with clients and insurers and addressing any basic enquiries raised.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Developing customer service skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Strong administrative, numeracy & analytical skills.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Branch Manager, Senior Brokers, Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1 year insurance industry experience desirable. May possess tertiary qualifications and / or relevant industry qualification.

Other comments

Position Description

Position title:	**Sales / Producer Sales Manager - Combined - Level 7**
Position code:	**FININS.SA.PS00.7**
Level:	**7**

Responsible for

Leading and successful P&L performance of the insurance lines branch network across New Zealand with product development, schemes and associations functional responsibility.. Primarily works with generation of new business/new accounts.

Report to

Senior Management, CEO

Supervises

A team across sales and service lines

Main activities

- Oversees the management of brokerage branches
- Develop, deliver and drive effective and profitable product strategies and review and monitor progress
- Develop new product ideas and initiatives together with the regional businesses to meet market needs and respond to economic, political, legislative or compliance changes
- Support the development and delivery of the annual business plan, budgets and initiatives
- Ongoing portfolio review and monitoring in line with strategies
- Act as a technical expert to support the identification of issues
- Lead, coach and mentor staff, providing technical expertise and guidance

Key skills

- Advanced knowledge of and exposure to Commercial Brokerage
- Excellent stakeholder management skills with the ability to communicate, negotiate and influence at all levels.
- Experience in a leadership role within brokerage

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

15- 20 years of insurance brokerage and leadership experience with relevant degrees and/or diplomas

Other comments

Position Description

Position title:	**Sales / Producer Sales Manager - Combined - Level 6**
Position code:	**FININS.SA.PS00.6**
Level:	**6**

Responsible for

Managing a branch operating separately as an autonomous profit centre.. Primarily works with generation of new business/new accounts.

Report to

Chief Executive Officer, Chief Operations Officer, Regional Manager.

Supervises

All staff within the Branch

Main activities

- Providing strategic direction, leading, managing and directing all operational activities of the branch
- Leading preparation, management, implementation and achievement of business plans and goals.
- Accountability for the overall profitability of the operational activities of the branch.
- Managing and motivating all branch staff.
- Identifying and capitalising on new business opportunities, which may include potential acquisitions.
- Creating a high performance sales culture by leading, developing and coaching Broking staff.
- Utilising local business networks to represent the organisation and generate new business.

Key skills

- Proven management experience at a senior level.
- Financial management/reporting and analysis skills.
- Strategic planning and resource management skills.
- Strong leadership and motivational ability.
- Superior client relationship management skills.
- Broad knowledge of insurance industry.
- Proven sales skills.

Internal contacts

Senior Brokers, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

At least 10+ years relevant management and operational experience coupled with tertiary level qualifications.

Other comments

Position Description

Position title:	**Sales / Validated Producer - Combined - Level 5**
Position code:	**FININS.SA.VP00.5**
Level:	**5**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

8 - 10 years insurance industry experience years of experience with at least 3 years experience managing client accounts at a senior level. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Sales / Validated Producer - Combined - Level 4**
Position code:	**FININS.SA.VP00.4**
Level:	**4**

Responsible for

Generating and maintaining a portfolio of key revenue generating accounts, ensuring quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager.

Supervises

Brokers, Associate Brokers, Broker Support staff.

Main activities

- Managing and growing a portfolio of client accounts.
- Investigating and pursuing new business opportunities in conjunction with Branch manager.
- Assisting with the preparation, management, implementation and achievement of business plans and goals.
- Managing and Leading a team of Broking and Support staff.
- Maintaining an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claims settlements on behalf of clients.
- Ensuring client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients.
- Implementing account retention and defence strategies
- Developing relationships with staff and underwriters to deliver solutions and outcomes designed to meet client needs.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Advanced customer service skills.
- Strong organisational and written / verbal communication skills.
- Ability to identify and develop new business opportunities.
- Strong presentation skills with ability to deliver clear, pertinent and succinct thought.
- Strong coaching and mentoring skills.

Internal contacts

Branch Manager, Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

5-7 years insurance industry experience years of experience. May hold relevant tertiary and/or postgraduate qualifications.

Other comments

Position Description

Position title:	**Sales / Validated Producer - Combined - Level 3**
Position code:	**FININS.SA.VP00.3**
Level:	**3**

Responsible for

Servicing a portfolio of accounts as allocated by the Branch Manager, ensuring high quality customer service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager - Broker Sales, Producer Sales Managers, Senior Brokers

Supervises

No supervisory responsibilities

Main activities

- Managing and growing a portfolio of client accounts.
- Providing front line client service in respect of those accounts.
- Implementing renewal and broking strategies in accordance with instructions received from Senior Brokers while liaising with claims staff to ensure client interests are protected.
- Ensuring the completion of activities delegated by Branch Manager or Senior Broker within determined parameters.
- Assisting Branch Manager/ Senior Brokers with the design, development, implementation, management and coordination of insurance programs for clients.
- Ensuring compliance of systems and processes with relevant legislation.
- Developing and maintaining meaningful working relationships with insurers.
- Assisting with the development and training of Assistant Brokers.

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Possess and apply a thorough technical knowledge of relevant lines of insurance and all associated legislation.
- Broad knowledge of insurance industry.
- Broad knowledge of insurance industry.
- Good customer service skills.
- Strong organisational and written / verbal communication skills.

Internal contacts

Branch Manager, Senior Brokers, Associate Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

2-4 years insurance industry experience. May have tertiary qualifications or relevant industry qualification.

Other comments

Position Description

Position title:	**Sales / Validated Producer - Combined - Level 2**
Position code:	**FININS.SA.VP00.2**
Level:	**2**

Responsible for

Providing assistance to Brokers and/or Senior Brokers, in all aspects of client service.. Primarily works with generation of new business/new accounts.

Report to

Branch Manager/Senior Broker.

Supervises

No supervisory responsibilities

Main activities

- Supporting the maintenance of effective working relationships with insurers and clients.
- Ensuring the timely and accurate production/processing of administration duties including invoices, quotes, premium and adjustments calculations.
- Maintaining the up to date management of databases, information systems and organisation company records.
- Ensuring the completion of all activities delegated by the Broker or Senior Broker within determined parameters.
- Liaising with clients and insurers and addressing any basic enquiries raised.
- Continually maintaining and acquiring an awareness of the industry, client's business and insurance needs

Key skills

- Ability to develop and maintain meaningful working relationships at all levels.
- Developing knowledge of the insurance industry.
- Strong organisational and written / verbal communication skills.
- Developing customer service skills.
- Knowledge of relevant lines of insurance and all associated legislation.
- Strong administrative, numeracy & analytical skills.
- Ability to set priorities and allocate time frames to achieve goals.

Internal contacts

Branch Manager, Senior Brokers, Brokers, Broker Support Staff, Claims Team.

External contacts

Clients, Insurers, New Business Prospects.

Typical experience

1 year insurance industry experience desirable. May possess tertiary qualifications and / or relevant industry qualification.

Other comments

Position Description

Position title:	**Head of Business, Commercial & Corporate Banking**
Position code:	**FINCCB.RM.MAMF.7**
Level:	**7**

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous profit centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas of responsibility.

Report to

Chief Executive Officer/ Managing Director or Chief Operating Officer

Supervises

Those managers and staff working within the functional areas of Business & Commercial Banking.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the multiple functions/areas and the achievement of associated revenue and expense budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional personnel.
- Acting as the chief spokesperson for the organisation in relation to the multi functions/areas of responsibility - as required.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Business & Commercial Banking Management and Teams. Sales and marketing staff, customer service and product development staff.

External contacts

Clients/customers, suppliers, industry associations.

Typical experience

At least 12 - 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

If a person has responsibility for ALL operational activities of the organisation, please match them to position code 10010 - Chief Operating Officer. Alternative Titles: General Manager - Subsidiary Operations, Head of a Major Profit Centre.

Position Description

Position title:	**Regional Manager - Business, Commercial & Corporate Banking**
Position code:	**FINCCB.RM.MAMF.6**
Level:	**6**

Responsible for

Managing the operating sections within a region profitably and in accordance with the organisation's policy and procedure outline.

Report to

General Manager/ Head of Business & Corporate Banking

Supervises

Branch Managers

Main activities

- Coordinating the activities of operating branches to achieve profit, administrative, sales and marketing plans/targets for the region.
- Assisting in the preparation of targets and objectives for the region and providing regular reporting feedback to Head Office as to actual progress to targets (budgets) outlining reasons for variances.
- Controlling the quality of services by effective direction of staff, monitoring the maintenance of correct procedures and taking corrective action.
- Approving large loans within limits of discretion.
- Maintaining and developing the personal skills of all staff in the region which includes the coordination of recruitment, training and development, performance assessment and reward.
- Being accountable for the maintenance of the organisation's policies and procedures within the region within prescribed limits of approval especially with regard to lending.
- Ensuring target rates are achieved by maintaining market intelligence, monitoring results and taking corrective action.
- Interacting with other operating and service divisions.

Key skills

- Sound management ability.
- Proven track record in achieving business targets.
- Good communication and interpersonal skills.
- Strong people management skills.

Internal contacts

Relevant staff at all levels, Support staff, Finance and Administration staff.

External contacts

Industry groups, property developers, insurers, Government departments other financial institutions.

Typical experience

Requires 10+ years extensive experience in all operating aspects. Staff management experience is essential. A professional qualification e.g.. C.P.A. may apply.

Other comments

Alternative Titles: Regional Sales Manager/Area Manager - Commercial Operations, District Manager - Commercial Finance.

Position Description

Position title:	**Head of Business Banking**
Position code:	**FINCCB.LE.BYMF.7**
Level:	**7**

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous profit centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas of responsibility.

Report to

Chief Executive Officer/ Managing Director or Chief Operating Officer

Supervises

Those managers and staff working within the functional areas of Business & Commercial Banking.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the multiple functions/areas and the achievement of associated revenue and expense budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional personnel.
- Acting as the chief spokesperson for the organisation in relation to the multi functions/areas of responsibility - as required.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Business & Commercial Banking Management and Teams. Sales and marketing staff, customer service and product development staff.

External contacts

Clients/customers, suppliers, industry associations.

Typical experience

At least 12 - 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

If a person has responsibility for ALL operational activities of the organisation, please match them to position code 10010 - Chief Operating Officer. Alternative Titles: General Manager - Subsidiary Operations, Head of a Major Profit Centre.

Position Description

Position title:	**Regional Manager - Business**
Position code:	**FINCCB.RM.BBMF.6**
Level:	**6**

Responsible for

Managing the operating sections within a region profitably and in accordance with the organisation's policy and procedure outline.

Report to

General Manager/ Head of Business & Corporate Banking

Supervises

Branch Managers

Main activities

- Coordinating the activities of operating branches to achieve profit, administrative, sales and marketing plans/targets for the region.
- Assisting in the preparation of targets and objectives for the region and providing regular reporting feedback to Head Office as to actual progress to targets (budgets) outlining reasons for variances.
- Controlling the quality of services by effective direction of staff, monitoring the maintenance of correct procedures and taking corrective action.
- Approving large loans within limits of discretion.
- Maintaining and developing the personal skills of all staff in the region which includes the coordination of recruitment, training and development, performance assessment and reward.
- Being accountable for the maintenance of the organisation's policies and procedures within the region within prescribed limits of approval especially with regard to lending.
- Ensuring target rates are achieved by maintaining market intelligence, monitoring results and taking corrective action.
- Interacting with other operating and service divisions.

Key skills

- Sound management ability.
- Proven track record in achieving business targets.
- Good communication and interpersonal skills.
- Strong people management skills.

Internal contacts

Relevant staff at all levels, Support staff, Finance and Administration staff.

External contacts

Industry groups, property developers, insurers, Government departments other financial institutions.

Typical experience

Requires 10+ years extensive experience in all operating aspects. Staff management experience is essential. A professional qualification e.g.. C.P.A. may apply.

Other comments

Alternative Titles: Regional Sales Manager/Area Manager - Commercial Operations, District Manager - Commercial Finance.

Position Description

Position title:	**Senior Banker - Business**
Position code:	**FINCCB.RM.BBMF.5**
Level:	**5**

Responsible for

Servicing a number of key SME clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Bankers/Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans.
- Reviewing existing client portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority
- Planning individual development plans for key customers.
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets and future growth potential.
- Effective negotiation and communication skills and developing management skills.
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities.
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Key Clients at all levels.

Typical experience

7+ years experience within an Banking Sales/Business Development role, coupled with undergraduate qualifications major in Finance.

Other comments

Alternative Titles: Senior Partner, Senior Account Manager, Senior Client Relationship Manager

Position Description

Position title:	**Banker - Business**
Position code:	**FINCCB.RM.BBMF.4**
Level:	**4**

Responsible for

Servicing a number of SME clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager or Senior Business Banker

Supervises

May Supervise Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Where appropriate, providing service to intermediaries, for example new business portfolio, renewal negotiations, acceptance and authorisation of lending.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business
- Accepting business within risk acceptance authority and referring risks in excess of their authority to the Regional Sales Manager
- Planning individual portfolio management for key customers
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4 - 5+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative Title: Account Manager

Position Description

Position title:	**Senior Associate - Business**
Position code:	**FINCCB.RM.BBMF.3**
Level:	**3**

Responsible for

Servicing a number of SME clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager, Business Banking, or Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business.
- .>Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

3+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Sales Representative/Account Manager

Position Description

Position title:	**Analyst - Business**
Position code:	**FINCCB.RM.BBMF.2**
Level:	**2**

Responsible for

Assisting with the service for a number of clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Business Banker

Supervises

Main activities

- Reviewing existing customer portfolios and providing commentary on strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business. Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Some knowledge of the local markets
- Developing negotiation and communication skills
- Developing relationships with customers and intermediaries and knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Typical experience

1 - 2 years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Position Description

Position title:	**Head of Corporate Banking**
Position code:	**FINCCB.LE.CSMF.7**
Level:	**7**

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous profit centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas of responsibility.

Report to

Chief Executive Officer/ Managing Director or Chief Operating Officer

Supervises

Those managers and staff working within the functional areas of Business & Commercial Banking.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the multiple functions/areas and the achievement of associated revenue and expense budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional personnel.
- Acting as the chief spokesperson for the organisation in relation to the multi functions/areas of responsibility - as required.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Business & Commercial Banking Management and Teams. Sales and marketing staff, customer service and product development staff.

External contacts

Clients/customers, suppliers, industry associations.

Typical experience

At least 12 - 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

If a person has responsibility for ALL operational activities of the organisation, please match them to position code 10010 - Chief Operating Officer. Alternative Titles: General Manager - Subsidiary Operations, Head of a Major Profit Centre.

Position Description

Position title:	**Regional Manager - Corporate**
Position code:	**FINCCB.RM.CBMF.6**
Level:	**6**

Responsible for

Managing the operating sections within a region profitably and in accordance with the organisation's policy and procedure outline.

Report to

General Manager/ Head of Business & Corporate Banking

Supervises

Branch Managers

Main activities

- Coordinating the activities of operating branches to achieve profit, administrative, sales and marketing plans/targets for the region.
- Assisting in the preparation of targets and objectives for the region and providing regular reporting feedback to Head Office as to actual progress to targets (budgets) outlining reasons for variances.
- Controlling the quality of services by effective direction of staff, monitoring the maintenance of correct procedures and taking corrective action.
- Approving large loans within limits of discretion.
- Maintaining and developing the personal skills of all staff in the region which includes the coordination of recruitment, training and development, performance assessment and reward.
- Being accountable for the maintenance of the organisation's policies and procedures within the region within prescribed limits of approval especially with regard to lending.
- Ensuring target rates are achieved by maintaining market intelligence, monitoring results and taking corrective action.
- Interacting with other operating and service divisions.

Key skills

- Sound management ability.
- Proven track record in achieving business targets.
- Good communication and interpersonal skills.
- Strong people management skills.

Internal contacts

Relevant staff at all levels, Support staff, Finance and Administration staff.

External contacts

Industry groups, property developers, insurers, Government departments other financial institutions.

Typical experience

Requires 10+ years extensive experience in all operating aspects. Staff management experience is essential. A professional qualification e.g.. C.P.A. may apply.

Other comments

Alternative Titles: Regional Sales Manager/Area Manager - Commercial Operations, District Manager - Commercial Finance.

Position Description

Position title:	**Senior Banker - Corporate**
Position code:	**FINCCB.RM.CBMF.5**
Level:	**5**

Responsible for

Servicing a number of key clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Director - Corporate Banking

Supervises

May Supervise Business Bankers/Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch plans.
- Reviewing existing client portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority
- Planning individual development plans for key customers.
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets and future growth potential.
- Effective negotiation and communication skills and developing management skills.
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities.
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Key Clients at all levels.

Typical experience

7+ years experience within an Banking Sales/Business Development role, coupled with undergraduate qualifications major in Finance.

Other comments

Alternative Titles: Senior Partner, Senior Account Manager, Senior Client Relationship Manager

Position Description

Position title:	**Banker - Corporate**
Position code:	**FINCCB.RM.CBMF.4**
Level:	**4**

Responsible for

Servicing a number of clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Regional Manager/Director - Corporate Banking

Supervises

May Supervise Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Where appropriate, providing service to intermediaries, for example new business portfolio, renewal negotiations, acceptance and authorisation of lending.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business
- Accepting business within risk acceptance authority and referring risks in excess of their authority to the Regional Sales Manager
- Planning individual portfolio management for key customers
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4 - 5+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative Titles: Business Development Manager, Account Manager, Client Relationship Manager

Position Description

Position title:	**Senior Associate - Corporate**
Position code:	**FINCCB.RM.CBMF.3**
Level:	**3**

Responsible for

Providing quantitative Research and information to facilitate informed business decisions.

Report to

Regional Manager - Corporate Banking/Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Business Bankers

External contacts

Typical experience

3-4+ years experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title:	**Analyst - Corporate**
Position code:	**FINCCB.RM.CBMF.2**
Level:	**2**

Responsible for

Assisting with the service for a number of clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Business Banker

Supervises

Main activities

- Reviewing existing customer portfolios and providing commentary on strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business. Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Some knowledge of the local markets
- Developing negotiation and communication skills
- Developing relationships with customers and intermediaries and knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Typical experience

1 - 2 years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Position Description

Position title:	**Manager - Property/Equipment/Asset Finance**
Position code:	**FINCCB.RM.ELMF.5**
Level:	**5**

Responsible for

Servicing a number of key SME clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Bankers/Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans.
- Reviewing existing client portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority
- Planning individual development plans for key customers.
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets and future growth potential.
- Effective negotiation and communication skills and developing management skills.
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities.
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Key Clients at all levels.

Typical experience

7+ years experience within an Banking Sales/Business Development role, coupled with undergraduate qualifications major in Finance.

Other comments

Alternative Titles: Senior Partner, Senior Account Manager, Senior Client Relationship Manager

Position Description

Position title:	**Banker/Business Development Manager - Property/Equipment/Asset Finance**
Position code:	**FINCCB.RM.ELMF.4**
Level:	**4**

Responsible for

Marketing a range of specialised financial products usually of higher value to major or large clients.

Report to

Manager, Property/Equipment/ Asset Finance

Supervises

May provide guidance to junior staff.

Main activities

- Achieving sales quotas for products.
- Selling to large clients/customers, often through third parties. Will often involve preparing complex lending applications.
- Analysing clients' financial circumstances and recommending appropriate financial products and services.
- Ensuring application details are provided comprehensively to assist swift processing.
- Maintaining close contact continually with major clients or third parties/dealers so as to maximise potential sales opportunities.
- Implementing marketing strategy & company procedures to maximise customer service and satisfaction.
- Continually monitoring competitor activities and offsetting these with third parties/dealers to present competitive advantage.

Key skills

- Top sales skills, supported by excellent product knowledge, an understanding of user needs, technological developments, trends and competitive activity.
- May have specialist business knowledge.

Internal contacts

Product Specialists, Customer Service, Sales and Administration Staff.

External contacts

Major Clients/Customers, Credit Reference Associations.

Typical experience

Will have at least 4-5 years relevant experience in finance and/or selling.

Other comments

Alternative Titles: Senior Sales Consultant, Senior Dealer Consultant.

Position Description

Position title:	**Account Manager - Property/Equipment/Asset Finance**
Position code:	**FINCCB.RM.ELMF.3**
Level:	**3**

Responsible for

Marketing a range of specialised financial products usually of higher value to major or large clients.

Report to

Business Development Manager, Property/Equipment/ Asset Finance

Supervises

No supervisory responsibilities.

Main activities

- Achieving sales quotas for products.
- Selling to allocated portfolio of clients/customers, sometimes through third parties. Preparing lending applications.
- Analysing clients' financial circumstances and recommending appropriate financial products and services.
- Ensuring application details are provided comprehensively to assist swift processing.
- Maintaining close contact continually with clients or third parties/dealers so as to maximise potential sales opportunities.
- Implementing marketing strategy & company procedures to maximise customer service and satisfaction.
- Continually monitoring competitor activities and reporting on market initiatives to assist in offsetting these with third parties/dealers to present competitive advantage.

Key skills

- Top sales skills, supported by excellent product knowledge, an understanding of user needs, technological developments, trends and competitive activity.
- May have specialist business knowledge.

Internal contacts

Product Specialists, Customer Service, Sales and Administration Staff.

External contacts

Major Clients/Customers, Credit Reference Associations.

Typical experience

Will have at least 3-4 years relevant experience in finance and/or selling.

Other comments

Alternative Titles: Sales Consultant, Dealer Consultant.

Position Description

Position title:	**Analyst - Property/Equipment/Asset Finance**
Position code:	**FINCCB.RM.ELMF.2**
Level:	**2**

Responsible for

Assisting with the service for a number of clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Business Banker

Supervises

Main activities

- Reviewing existing customer portfolios and providing commentary on strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business. Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Some knowledge of the local markets
- Developing negotiation and communication skills
- Developing relationships with customers and intermediaries and knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Typical experience

1 - 2 years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Position Description

Position title:	**Senior Banker - Agribusiness**
Position code:	**FINCCB.RM.MCAG.5**
Level:	**5**

Responsible for

Servicing a number of key agribusiness clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Branch Manager, Regional Manager

Supervises

May Supervise Bankers/Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans.
- Reviewing existing client portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority
- Planning individual development plans for key customers.
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets and future growth potential.
- Effective negotiation and communication skills and developing management skills.
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities.
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Key Clients at all levels.

Typical experience

7+ years experience within an Banking Sales/Business Development role, coupled with undergraduate qualifications major in Finance.

Other comments

Alternative Titles: Senior Partner, Senior Account Manager, Senior Client Relationship Manager

Position Description

Position title:	**Banker - Agribusiness**
Position code:	**FINCCB.RM.MCAG.4**
Level:	**4**

Responsible for

Servicing a number of key agribusiness clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Where appropriate, providing service to intermediaries, for example new business portfolio, renewal negotiations, acceptance and authorisation of lending.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business
- Accepting business within risk acceptance authority and referring risks in excess of their authority to the Regional Sales Manager
- Planning individual portfolio management for key customers
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4 - 5+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative titles: Account Manager, Rural Manager, Partner - Agribusiness, Relationship Manager - Agribusiness

Position Description

Position title:	**Senior Associate - Agribusiness**
Position code:	**FINCCB.RM.MCAG.3**
Level:	**3**

Responsible for

Servicing a number of key agribusiness clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager or Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business.
- .>Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Sales Representative

Position Description

Position title:	**Analyst - Agribusiness**
Position code:	**FINCCB.RM.MCAG.2**
Level:	**2**

Responsible for

Assisting with the service for a number of clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Business Banker

Supervises

Main activities

- Reviewing existing customer portfolios and providing commentary on strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business. Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Some knowledge of the local markets
- Developing negotiation and communication skills
- Developing relationships with customers and intermediaries and knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Typical experience

1 - 2 years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Position Description

Position title:	**Head of Commercial Banking**
Position code:	**FINCCB.LE.ERMF.7**
Level:	**7**

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous profit centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas of responsibility.

Report to

Chief Executive Officer/ Managing Director or Chief Operating Officer

Supervises

Those managers and staff working within the functional areas of Business & Commercial Banking.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the multiple functions/areas and the achievement of associated revenue and expense budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional personnel.
- Acting as the chief spokesperson for the organisation in relation to the multi functions/areas of responsibility - as required.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Business & Commercial Banking Management and Teams. Sales and marketing staff, customer service and product development staff.

External contacts

Clients/customers, suppliers, industry associations.

Typical experience

At least 12 - 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

If a person has responsibility for ALL operational activities of the organisation, please match them to position code 10010 - Chief Operating Officer. Alternative Titles: General Manager - Subsidiary Operations, Head of a Major Profit Centre.

Position Description

Position title:	**Regional Manager - Commercial**
Position code:	**FINCCB.RM.MCMF.6**
Level:	**6**

Responsible for

Managing the operating sections within a region profitably and in accordance with the organisation's policy and procedure outline.

Report to

General Manager/ Head of Business & Corporate Banking

Supervises

Branch Managers

Main activities

- Coordinating the activities of operating branches to achieve profit, administrative, sales and marketing plans/targets for the region.
- Assisting in the preparation of targets and objectives for the region and providing regular reporting feedback to Head Office as to actual progress to targets (budgets) outlining reasons for variances.
- Controlling the quality of services by effective direction of staff, monitoring the maintenance of correct procedures and taking corrective action.
- Approving large loans within limits of discretion.
- Maintaining and developing the personal skills of all staff in the region which includes the coordination of recruitment, training and development, performance assessment and reward.
- Being accountable for the maintenance of the organisation's policies and procedures within the region within prescribed limits of approval especially with regard to lending.
- Ensuring target rates are achieved by maintaining market intelligence, monitoring results and taking corrective action.
- Interacting with other operating and service divisions.

Key skills

- Sound management ability.
- Proven track record in achieving business targets.
- Good communication and interpersonal skills.
- Strong people management skills.

Internal contacts

Relevant staff at all levels, Support staff, Finance and Administration staff.

External contacts

Industry groups, property developers, insurers, Government departments other financial institutions.

Typical experience

Requires 10+ years extensive experience in all operating aspects. Staff management experience is essential. A professional qualification e.g.. C.P.A. may apply.

Other comments

Alternative Titles: Regional Sales Manager/Area Manager - Commercial Operations, District Manager - Commercial Finance.

Position Description

Position title:	**Senior Banker - Commercial**
Position code:	**FINCCB.RM.MCMF.5**
Level:	**5**

Responsible for

Servicing a number of key clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Bankers/Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans.
- Reviewing existing client portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority
- Planning individual development plans for key customers.
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets and future growth potential.
- Effective negotiation and communication skills and developing management skills.
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities.
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Key Clients at all levels.

Typical experience

7+ years experience within an Banking Sales/Business Development role, coupled with undergraduate qualifications major in Finance.

Other comments

Alternative Titles: Senior Partner, Senior Account Manager, Senior Client Relationship Manager

Position Description

Position title:	**Banker - Commercial**
Position code:	**FINCCB.RM.MCMF.4**
Level:	**4**

Responsible for

Servicing a number of clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Where appropriate, providing service to intermediaries, for example new business portfolio, renewal negotiations, acceptance and authorisation of lending.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business
- Accepting business within risk acceptance authority and referring risks in excess of their authority to the Regional Sales Manager
- Planning individual portfolio management for key customers
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4 - 5+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative titles: Account Manager, Commercial Account Manager, Relationship Manager - Commercial

Position Description

Position title:	**Senior Associate - Commercial**
Position code:	**FINCCB.RM.MCMF.3**
Level:	**3**

Responsible for

Servicing a number of clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager or Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business.
- .>Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative titles: Sales Representative, Relationship Manager

Position Description

Position title:	**Analyst - Commercial**
Position code:	**FINCCB.RM.MCMF.2**
Level:	**2**

Responsible for

Assisting with the service for a number of clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Business Banker

Supervises

Main activities

- Reviewing existing customer portfolios and providing commentary on strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business. Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Some knowledge of the local markets
- Developing negotiation and communication skills
- Developing relationships with customers and intermediaries and knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Typical experience

1 - 2 years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Position Description

Position title:	**Head of Transaction Banking**
Position code:	**FINCCB.LE.HSMF.7**
Level:	**7**

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous profit centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas of responsibility.

Report to

Chief Executive Officer/ Managing Director or Chief Operating Officer

Supervises

Those managers and staff working within the functional areas of Business & Commercial Banking.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the multiple functions/areas and the achievement of associated revenue and expense budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional personnel.
- Acting as the chief spokesperson for the organisation in relation to the multi functions/areas of responsibility - as required.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Business & Commercial Banking Management and Teams. Sales and marketing staff, customer service and product development staff.

External contacts

Clients/customers, suppliers, industry associations.

Typical experience

At least 12 - 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

If a person has responsibility for ALL operational activities of the organisation, please match them to position code 10010 - Chief Operating Officer. Alternative Titles: General Manager - Subsidiary Operations, Head of a Major Profit Centre.

Position Description

Position title:	**Regional Manager - Transaction Banking**
Position code:	**FINCCB.RM.TBMF.6**
Level:	**6**

Responsible for
Managing the operating sections within a region profitably and in accordance with the organisation's policy and procedure outline.

Report to
General Manager/ Head of Business & Corporate Banking

Supervises
Branch Managers

Main activities
- Coordinating the activities of operating branches to achieve profit, administrative, sales and marketing plans/targets for the region.
- Assisting in the preparation of targets and objectives for the region and providing regular reporting feedback to Head Office as to actual progress to targets (budgets) outlining reasons for variances.
- Controlling the quality of services by effective direction of staff, monitoring the maintenance of correct procedures and taking corrective action.
- Approving large loans within limits of discretion.
- Maintaining and developing the personal skills of all staff in the region which includes the coordination of recruitment, training and development, performance assessment and reward.
- Being accountable for the maintenance of the organisation's policies and procedures within the region within prescribed limits of approval especially with regard to lending.
- Ensuring target rates are achieved by maintaining market intelligence, monitoring results and taking corrective action.
- Interacting with other operating and service divisions.

Key skills
- Sound management ability.
- Proven track record in achieving business targets.
- Good communication and interpersonal skills.
- Strong people management skills.

Internal contacts
Relevant staff at all levels, Support staff, Finance and Administration staff.

External contacts
Industry groups, property developers, insurers, Government departments other financial institutions.

Typical experience
Requires 10+ years extensive experience in all operating aspects. Staff management experience is essential. A professional qualification e.g.. C.P.A. may apply.

Other comments
Alternative Titles: Regional Sales Manager/Area Manager - Commercial Operations, District Manager - Commercial Finance.

Position Description

Position title:	**Senior Banker - Transaction Banking**
Position code:	**FINCCB.RM.TBMF.5**
Level:	**5**

Responsible for

Servicing a number of key SME clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Bankers/Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans.
- Reviewing existing client portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business.
- Accepting business within risk acceptance authority
- Planning individual development plans for key customers.
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets and future growth potential.
- Effective negotiation and communication skills and developing management skills.
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities.
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Key Clients at all levels.

Typical experience

7+ years experience within an Banking Sales/Business Development role, coupled with undergraduate qualifications major in Finance.

Other comments

Alternative Titles: Senior Partner, Senior Account Manager, Senior Client Relationship Manager

Position Description

Position title:	**Banker - Transaction Banking**
Position code:	**FINCCB.RM.TBMF.4**
Level:	**4**

Responsible for

Servicing a number of clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager

Supervises

May Supervise Account Managers

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Where appropriate, providing service to intermediaries, for example new business portfolio, renewal negotiations, acceptance and authorisation of lending.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base and growth of new business
- Accepting business within risk acceptance authority and referring risks in excess of their authority to the Regional Sales Manager
- Planning individual portfolio management for key customers
- Monitoring and reporting on achievement to budget.

Key skills

- Broad knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Broad knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4 - 5+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Alternative titles: Account Manager, Commercial Account Manager, Relationship Manager - Commercial

Position Description

Position title:	**Senior Associate - Transaction Banking**
Position code:	**FINCCB.RM.TBMF.3**
Level:	**3**

Responsible for

Servicing a number of clients to maintain a positive level of growth of income with emphasis on profitability.

Report to

Regional Manager or Senior Business Banker

Supervises

No supervisory responsibilities.

Main activities

- Achieving individual profit and business growth targets to contribute to attainment of Branch/Departmental plans
- Reviewing existing customer portfolios and recommending strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business.
- .>Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Knowledge of the local markets
- Effective negotiation and communication skills
- Ability to develop and grow relationships with customers and intermediaries and identify new business development opportunities
- Knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Clients at all levels.

Typical experience

4+ years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Position Description

Position title:	**Analyst - Transaction Banking**
Position code:	**FINCCB.RM.TBMF.2**
Level:	**2**

Responsible for

Assisting with the service for a number of clients to maintain a positive level of growth of premium income with emphasis on profitability.

Report to

Business Banker

Supervises

Main activities

- Reviewing existing customer portfolios and providing commentary on strategies for increasing growth.
- Contributing to the achievement of the Branch/Departmental operating plan through effective servicing and development of the existing client base, following up on potential new business. Planning individual portfolio management for allocated customers
- Monitoring and reporting on achievement to budget.

Key skills

- Some knowledge of the local markets
- Developing negotiation and communication skills
- Developing relationships with customers and intermediaries and knowledge of all bank products.

Internal contacts

Sales & Marketing; Customer Service; Finance.

External contacts

Typical experience

1 - 2 years experience within an Banking Sales/Business Development role, coupled with Business qualification.

Other comments

Position Description

Position title:	**Head of Investment Banking**
Position code:	**FINIBD.LE.EJMF.7**
Level:	**7**

Responsible for

Establishing and controlling the national sales strategy and sales force to achieve revenue and expense targets with a focus on existing accounts

Report to

Chief Executive/Managing Director.

Supervises

A national sales force, including state or area sales managers, product specialists and sales representatives.. Working with other relevant managers to develop national sales strategy.. Monitoring sales and expense performance, and initiating corrective action where necessaryDeveloping budget, and regularly reporting actual performance to budget, with variance analyses and revised projections.. Coordinating the gathering of market intelligence covering competitors' products and sales strategies.. Monitoring and reporting on the performance of dealers and distribution channels.. Recruiting, training and motivating sales staff.

Main activities

- Motivational and persuasive skills are very important, as are product knowledge, planning and administration, and an ability to negotiate complex sales at senior levels.
- Budgetary formulation and control abilities.

Key skills

- Marketing executives and specialists, state or branch managers/sales managers, credit, finance and human resources managers and legal officer.

Internal contacts

Major customers, advertising agencies and public relations firms, distributors, State and Federal Government official

External contacts

At least 12 years related sales/marketing experience. May have tertiary qualifications in technical/business areas.

Typical experience

Other comments

Position Description

Position title:	**Director**
Position code:	**FINIBD.RM.ICCC.6**
Level:	**6**

Responsible for

Working closely with the CEO or equivalent within the client's organisation to maximise revenue from a strategic client account in order to achieve agreed revenue targets/sales quotas and ensure complete customer satisfaction when dealing with the organisation.

Report to

Sales Director, General Manager.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' in order to close sales.

Main activities

- Consulting with the CEO or equivalent within the client's organisation to formulate, implement and manage strategic business plans regarding the client's account to achieve sales revenue/sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining the account.
- Working closely with strategic employees within the client's organisation to determine present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times and continually seeking the opportunity to participate in client's strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of sales proposals, tenders/bids, contracts and Account Management plans.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability, excellent communication skills and the ability to interact at a strategic level.
- Strong ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of the account, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

All levels of Staff, Marketing Staff, Customer & Technical Support, Research and Development Staff

External contacts

Clients, Suppliers, Representatives of Business Partners, Competitors, Industry Contacts, Government Bodies.

Typical experience

10+ years of Sales experience, may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Associate Director**
Position code:	**FINIBD.RM.ICCC.5**
Level:	**5**

Responsible for

Maintains and develop relationships with organisation's strategic accounts, maximising revenue from in order to achieve agreed revenue targets/sales quotas and ensure account objectives are met.

Report to

Sales Manager, Senior Sales Manager, Sales Director.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' to close sales.

Main activities

- Formulating, implementing and managing business plans regarding strategic client accounts to achieve sales revenue/sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining the strategic client account.
- Working closely with strategic clients to determine their present and future needs, and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times.
- Lead the clients' strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of sales proposals, tenders/bids, contracts and account management plans.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Strong ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of the account, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

Sales, Marketing, Customer and Technical Support, Research and Development,

External contacts

Clients, suppliers, representatives of business partners, competitors, industry contacts, government bodies.

Typical experience

8 - 10 years of Sales experience, may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Relationship Manager**
Position code:	**FINIBD.RM.ICCC.4**
Level:	**4**

Responsible for

Maximising revenue from one or a small number of client accounts in order to achieve agreed revenue targets/sales quotas and ensure complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Sales Manager.

Supervises

Typically employees in this role would be individual contributors that would build a 'virtual team' in order to close sales, but may supervise more junior account managers on the account team

Main activities

- Formulating, implementing and managing strategic business plans regarding one or a small number of client accounts to achieve Sales revenue/Sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining designated account/s.
- Working closely with clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times and continually seeking the opportunity to participate in client's strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.

Key skills

- Proven Sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Specialist product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of designated accounts, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

All levels of Sales Staff, Marketing Staff, Customer & Technical Support, Research & Development Staff

External contacts

Clients, Suppliers, Representatives of Business Partners, Competitors, Industry Contacts, Government Bodies.

Typical experience

5 - 8 years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Associate**
Position code:	**FINIBD.RM.ICCC.3**
Level:	**3**

Responsible for

Maximising revenue from one or a small number of client accounts in order to achieve agreed revenue targets/sales quotas and ensure complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Sales Manager.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' in order to close sales.

Main activities

- Formulating, implementing and managing strategic business plans regarding one or a small number of client accounts to achieve Sales revenue/Sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining designated account/s.
- Working closely with clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times and continually seeking the opportunity to participate in clients' strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.

Key skills

- Proven Sales ability including strong negotiation skills, persuasive ability and excellent communication skills.
- Specialist product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of designated accounts, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

All levels of Sales Staff, Marketing Staff, Customer and Technical Support, Research and Development Staff,

External contacts

Clients, Suppliers, Representatives of Business Partners, Competitors, Industry Contacts, Government Bodies.

Typical experience

3 - 5 years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Analyst**
Position code:	**FINIBD.RM.ICCC.2**
Level:	**2**

Responsible for

Supporting Relationship Managers in the delivery of the service.

Report to

National/Senior/Account Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing new business quotes and negotiating renewals.
- Assisting Account Managers in servicing customer base.
- Maintaining files.

Key skills

- Developing a knowledge of local markets.
- Effective organisational and communication skills.

Internal contacts

n/a

External contacts

n/a

Typical experience

n/a

Other comments

Position Description

Position title:	**National Assessing Manager Multi-focus**
Position code:	**FININS.CL.AMMF.6**
Level:	**6**

Responsible for

Managing the Motor Vehicle Assessing and Parts Control or Home nd/or Contents Assessing functions for the area/branch.

Report to

National Assessing Manager.

Supervises

Assessors, Loss Control/Risk Consultants, Fraud/Investigators

Main activities

- Managing internal/external Motor Vehicle Loss Assessors and managing the Motor Assessing budget for the area/branch.
- Ensuring damaged vehicles/homes are Assessed promptly and the appropriate price is paid for repairs and total loss settlements.
- Reporting to Management, the area/branch's performance in relation to the management and monitoring of repair cost, Assessor performance (internal and external) repairer performance and additional relevant statistical information.
- Setting and maintaining performance standards for providing service to customers.
- Developing and maintaining a repair account checking process to ensure the right price is paid on the repairers account.
- Developing statistical information and reporting on the performance of staff and the repair industry.
- Developing and maintaining relationships with the state repairer organisations.
- Establishing communication links with the major motor manufacturers in order to create long term, quality business relationships in the interest of policy holders.Recruiting staff and carrying out performance agreement and appraisal reviews on Area/Branch Assessing and Motor Part/Home & Contents staff.

Key skills

- Broad knowledge of the Assessing/Insurance organisations policies and industry.
- Management training including TQM principles.
- Leadership and team building skills with the ability to handle conflict.
- Ability to think outside the conventional approach in solving problems.
- Proven negotiation skills.
- Ability to analyse statistical data incorporating computer skills and to understand and implement performance measures.

Internal contacts

Claims, Assessing, Loss Control/Risk.

External contacts

Policy Holders, Repairer Organisations.

Typical experience

Minimum 5 years experience within the Assessing Industry in a Management capacity, licensed as required for relevent industry line

Other comments

Position Description

Position title:	**Assessing Manager Multi-focus**
Position code:	**FININS.CL.AMMF.5**
Level:	**5**

Responsible for

Managing the Motor Vehicle Assessing and Parts Control functions for the area/branch.

Report to

National Assessing Manager.

Supervises

Up to 100 employees.

Main activities

- Managing internal/external Motor Vehicle Loss Assessors and managing the Motor Assessing budget for the area/branch.
- Ensuring damaged vehicles are Assessed promptly and the appropriate price is paid for repairs and total loss settlements.
- Reporting to Management, the area/branch's performance in relation to the management and monitoring of repair cost, Assessor performance (internal and external) repairer performance and additional relevant statistical information.
- Setting and maintaining performance standards for providing service to customers.
- Developing and maintaining a repair account checking process to ensure the right price is paid on the Smash Repairer's account.
- Developing statistical information and reporting on the performance of staff and the repair industry.
- Establishing communication links with the major motor manufacturers in order to create long term, quality business relationships in the interest of policy holders.
- Recruiting staff and carrying out performance agreement and appraisal reviews on Area/Branch Assessing and Motor Part staff.

Key skills

- Broad knowledge of the Assessing/Insurance organisations policies and the smash repair industry.
- Management training including TQM principles.
- Leadership and team building skills with the ability to handle conflict.
- Ability to think outside the conventional approach in solving problems.
- Proven negotiation skills.
- Ability to analyse statistical data incorporating computer skills and to understand and implement performance measures.

Internal contacts

Claims, Assessing, Loss Control/Risk.

External contacts

Policy Holders, Repairer Organisations.

Typical experience

Minimum 5 years experience within the Motor Vehicle Assessing Industry in a Management capacity, licensed as a Motor Vehicle Loss Assessor.

Other comments

Position Description

Position title:	**Senior Home Assessor - Personal Lines**
Position code:	**FININS.CL.ASPL.4**
Level:	**4**

Responsible for

Assessing damage/loss to insured home and/or contents and supervising and coordinating repair work to ensure restoration with minimal inconvenience to the policy holder and at a fair and reasonable cost to the insurer.

Report to

National Assessing Manager, Claims Manager.

Supervises

May supervise more junior assessors.

Main activities

- Receiving and responding to assessment bookings.
- Inspecting damaged property and obtaining repairer quotes.
- Obtaining accurate details and completing assessment report.
- Negotiating and adjusting repairer's quotations as required and authorising repairs based on best quote.
- Supervising quality control of repair work.
- Developing an accurate and complete 'Scope of Work' or 'Statement of Loss' as per standards outlined in the organisation's manual.
- Determining policy entitlements and accurately advising the policy holder of entitlements and effects on policy.
- Informing customers about how their loss will be managed.
- Establishing equitable settlements between insurer, repairer and client.

Key skills

- Knowledge of the building industry.
- Good communication and negotiation skills.
- Problem solving ability.
- Good customer service skills.

Internal contacts

Loss Adjustment/Risk Control Department; Claims Processing; Customer Service.

External contacts

Repairers; Clients.

Typical experience

5+ years experience in Home and Contents Assessment coupled with relevant qualifications for industry line.

Other comments

Position Description

Position title:	**Home Assessor - Personal Lines**
Position code:	**FININS.CL.ASPL.3**
Level:	**3**

Responsible for

Assessing damage/loss to insured home and/or contents and supervising and coordinating repair work to ensure restoration with minimal inconvenience to the policy holder and at a fair and reasonable cost to the insurer.

Report to

Assessing Manager.

Supervises

No supervisory responsibilities.

Main activities

- Receiving and responding to assessment bookings.
- Inspecting damaged property and obtaining repairer quotes.
- Obtaining accurate details and completing assessment report.
- Negotiating and adjusting repairer's quotations as required and authorising repairs based on best quote.
- Supervising quality control of repair work.
- Developing an accurate and complete 'Scope of Work' or 'Statement of Loss' as per standards outlined in the organisation's manual.
- Determining policy entitlements and accurately advising the policy holder of entitlements and effects on policy.
- Informing customers about how their loss will be managed.
- Establishing equitable settlements between insurer, repairer and client.

Key skills

- Knowledge of the building industry.
- Good communication and negotiation skills.
- Problem solving ability.
- Good customer service skills.

Internal contacts

Loss Adjustment/Risk Control Department; Claims Processing; Customer Service.

External contacts

Repairers; Clients.

Typical experience

3 - 5+ years experience in Home and Contents Assessment, coupled with building qualifications.

Other comments

Position Description

Position title:	**Senior Motor Vehicle Assessor - Commercial Lines**
Position code:	**FININS.CL.MVCL.4**
Level:	**4**

Responsible for

Assessing damage to insured motor vehicles and supervising and coordinating repair work to ensure restoration with minimal inconvenience to the policy holder and at a fair and reasonable cost to the insurer.

Report to

National Assessing Manager, Claims Manager.

Supervises

May supervise more junior assessors.

Main activities

- Inspecting damaged motor vehicle and obtaining repairer quotes.
- Locating and negotiating acceptable replacement parts if required.
- Negotiating and adjusting repairer's quotations as required.
- Contacting and assigning cars to a repair facility.
- Authorising repairs based on the fairest and best value quotations.
- Supervising quality control repair work in progress and monitoring lag time for repairs.
- Acting as liaison and establishing equitable settlements between Employer, Repair Facilities, Suppliers and Client.
- Making recommendations on the percentage of liability for the insurer with both clients and repairers through careful and efficient management of the assessment process.
- Ensuring all assessments are undertaken within the Industry accepted repair procedures and Organisation policy.

Key skills

- Knowledge of the smash repair industry.
- Good communication and negotiation skills.
- Knowledge of motor vehicle construction.
- Problem solving skills.

Internal contacts

Claims department.

External contacts

Employers, Repair Facilities, Suppliers, Clients.

Typical experience

5+ years experience along with a Motor Vehicle Loss Assessor Licence.

Other comments

Position Description

Position title:	**Motor Vehicle Assessor - Commercial Lines**
Position code:	**FININS.CL.MVCL.3**
Level:	**3**

Responsible for

Assessing damage to insured motor vehicles and supervising and coordinating repair work to ensure restoration with minimal inconvenience to the policy holder and at a fair and reasonable cost to the insurer.

Report to

National Assessing Manager, Claims Manager.

Supervises

No supervisory responsibilities.

Main activities

- Inspecting damaged motor vehicle and obtaining repairer quotes.
- Locating and negotiating acceptable replacement parts if required.
- Negotiating and adjusting repairer's quotations as required.
- Contacting and assigning cars to a repair facility.
- Authorising repairs based on the fairest and best value quotations.
- Supervising quality control repair work in progress and monitoring lag time for repairs.
- Acting as liaison and establishing equitable settlements between Employer, Repair Facilities, Suppliers and Client.
- Making recommendations on the percentage of liability for the insurer with both clients and repairers through careful and efficient management of the assessment process.
- Ensuring all assessments are undertaken within the Industry accepted repair procedures and Organisation policy.

Key skills

- Knowledge of the smash repair industry.
- Good communication and negotiation skills.
- Knowledge of motor vehicle construction.
- Problem solving skills.

Internal contacts

Claims department.

External contacts

Employers, Repair Facilities, Suppliers, Clients.

Typical experience

At least 3-4 years experience together with a Motor Vehicle Loss Assessor Licence.

Other comments

Position Description

Position title:	**Senior Motor Vehicle Assessor - Personal Lines**
Position code:	**FININS.CL.MVPL.4**
Level:	**4**

Responsible for

Assessing damage to insured motor vehicles and supervising and coordinating repair work to ensure restoration with minimal inconvenience to the policy holder and at a fair and reasonable cost to the insurer.

Report to

National Assessing Manager, Claims Manager.

Supervises

May supervise more junior assessors.

Main activities

- Inspecting damaged motor vehicle and obtaining repairer quotes.
- Locating and negotiating acceptable replacement parts if required.
- Negotiating and adjusting repairer's quotations as required.
- Contacting and assigning cars to a repair facility.
- Authorising repairs based on the fairest and best value quotations.
- Supervising quality control repair work in progress and monitoring lag time for repairs.
- Acting as liaison and establishing equitable settlements between Employer, Repair Facilities, Suppliers and Client.
- Making recommendations on the percentage of liability for the insurer with both clients and repairers through careful and efficient management of the assessment process.
- Ensuring all assessments are undertaken within the Industry accepted repair procedures and Organisation policy.

Key skills

- Knowledge of the smash repair industry.
- Good communication and negotiation skills.
- Knowledge of motor vehicle construction.
- Problem solving skills.

Internal contacts

Claims department.

External contacts

Employers, Repair Facilities, Suppliers, Clients.

Typical experience

5+ years experience along with a Motor Vehicle Loss Assessor Licence.

Other comments

Position Description

Position title:	**Motor Vehicle Assessor - Personal Lines**
Position code:	**FININS.CL.MVPL.3**
Level:	**3**

Responsible for

Assessing damage to insured motor vehicles and supervising and coordinating repair work to ensure restoration with minimal inconvenience to the policy holder and at a fair and reasonable cost to the insurer.

Report to

National Assessing Manager, Claims Manager.

Supervises

No supervisory responsibilities.

Main activities

- Inspecting damaged motor vehicle and obtaining repairer quotes.
- Locating and negotiating acceptable replacement parts if required.
- Negotiating and adjusting repairer's quotations as required.
- Contacting and assigning cars to a repair facility.
- Authorising repairs based on the fairest and best value quotations.
- Supervising quality control repair work in progress and monitoring lag time for repairs.
- Acting as liaison and establishing equitable settlements between Employer, Repair Facilities, Suppliers and Client.
- Making recommendations on the percentage of liability for the insurer with both clients and repairers through careful and efficient management of the assessment process.
- Ensuring all assessments are undertaken within the Industry accepted repair procedures and Organisation policy.

Key skills

- Knowledge of the smash repair industry.
- Good communication and negotiation skills.
- Knowledge of motor vehicle construction.
- Problem solving skills.

Internal contacts

Claims department.

External contacts

Employers, Repair Facilities, Suppliers, Clients.

Typical experience

At least 3-4 years experience together with a Motor Vehicle Loss Assessor Licence.

Other comments

Position Description

Position title:	**Motor Vehicle Assessor - Combined - Level 3**
Position code:	**FININS.CL.MV00.3**
Level:	**3**

Responsible for

Assessing damage to insured motor vehicles and supervising and coordinating repair work to ensure restoration with minimal inconvenience to the policy holder and at a fair and reasonable cost to the insurer.

Report to

National Assessing Manager, Claims Manager.

Supervises

No supervisory responsibilities.

Main activities

- Inspecting damaged motor vehicle and obtaining repairer quotes.
- Locating and negotiating acceptable replacement parts if required.
- Negotiating and adjusting repairer’s quotations as required.
- Contacting and assigning cars to a repair facility.
- Authorising repairs based on the fairest and best value quotations.
- Supervising quality control repair work in progress and monitoring lag time for repairs.
- Acting as liaison and establishing equitable settlements between Employer, Repair Facilities, Suppliers and Client.
- Making recommendations on the percentage of liability for the insurer with both clients and repairers through careful and efficient management of the assessment process.
- Ensuring all assessments are undertaken within the Industry accepted repair procedures and Organisation policy.

Key skills

- Knowledge of the smash repair industry.
- Good communication and negotiation skills.
- Knowledge of motor vehicle construction.
- Problem solving skills.

Internal contacts

Claims department.

External contacts

Employers, Repair Facilities, Suppliers, Clients.

Typical experience

At least 3-4 years experience together with a Motor Vehicle Loss Assessor Licence.

Other comments

Position Description

Position title:	**Motor Vehicle Assessor - Combined - Level 4**
Position code:	**FININS.CL.MV00.4**
Level:	**4**

Responsible for
Assessing damage to insured motor vehicles and supervising and coordinating repair work to ensure restoration with minimal inconvenience to the policy holder and at a fair and reasonable cost to the insurer.

Report to
National Assessing Manager, Claims Manager.

Supervises
May supervise more junior assessors.

Main activities
- Inspecting damaged motor vehicle and obtaining repairer quotes.
- Locating and negotiating acceptable replacement parts if required.
- Negotiating and adjusting repairer's quotations as required.
- Contacting and assigning cars to a repair facility.
- Authorising repairs based on the fairest and best value quotations.
- Supervising quality control repair work in progress and monitoring lag time for repairs.
- Acting as liaison and establishing equitable settlements between Employer, Repair Facilities, Suppliers and Client.
- Making recommendations on the percentage of liability for the insurer with both clients and repairers through careful and efficient management of the assessment process.
- Ensuring all assessments are undertaken within the Industry accepted repair procedures and Organisation policy.

Key skills
- Knowledge of the smash repair industry.
- Good communication and negotiation skills.
- Knowledge of motor vehicle construction.
- Problem solving skills.

Internal contacts
Claims department.

External contacts
Employers, Repair Facilities, Suppliers, Clients.

Typical experience
5+ years experience along with a Motor Vehicle Loss Assessor Licence.

Other comments

Position Description

Position title:	**Claims Specialist / Processing - Combined - Level 6**
Position code:	**FININS.CL.CL00.6**
Level:	**6**

Responsible for

Establishing, monitoring and controlling claims management systems, standards and techniques to ensure claims, functional and operational units provide an effective, economic and prompt claims management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Specialist / Processing - Combined - Level 5**
Position code:	**FININS.CL.CL00.5**
Level:	**5**

Responsible for
Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to
National Claims Manager.

Supervises
Claims Supervisors/Team Leaders.

Main activities
- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills
- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts
Management.

External contacts
Management within the General Insurance Industry, General Counsel as required.

Typical experience
At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Specialist / Processing - Combined - Level 4**
Position code:	**FININS.CL.CL00.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Specialist / Processing - Combined - Level 3**
Position code:	**FININS.CL.CL00.3**
Level:	**3**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Specialist / Processing - Combined - Level 2**
Position code:	**FININS.CL.CL00.2**
Level:	**2**

Responsible for
Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to
Claims Supervisor/Team Leader.

Supervises
No supervisory responsibilities.

Main activities
- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills
- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts
Claims Department, Underwriting Department, Actuarial Department.

External contacts
Agents, Brokers, Customers, Trustees.

Typical experience
At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Specialist / Processing - Combined - Level 1**
Position code:	**FININS.CL.CL00.1**
Level:	**1**

Responsible for

Providing day to day administrative support to the Claims function.

Report to

Claims Manager.

Supervises

No supervisory responsibilities.

Main activities

- Assisting with ad hoc duties on behalf of Claims Assessors.
- Maintaining and updating files for use within the Claims Department.
- Entering data into company Claims Systems as required.
- Compiling historical information from company files on behalf of Claims Assessors.
- Answering all general phone enquiries.

Key skills

- Organisational ability.
- Administration skills.
- Good computer skills.
- Good communication skills.

Internal contacts

Claims department, Underwriters.

External contacts

Suppliers, Customers.

Typical experience

Limited commercial experience, will typically have completed Year 12.

Other comments

This is an entry level position.

Position Description

Position title:	**Chief Claims Officer**
Position code:	**FININS.CL.CIMF.7**
Level:	**7**

Responsible for

Oversight of claims operations, strategy, implementing process improvements and effective management of claims handling. Reviewing the activities of claims centres to achieve or better target levels of business growth and profitability.

Report to

Chief Executive Officer, Chief Operating Officer, Chief Financial Officer

Supervises

National Claims Managers, Claims Strategy Managers

Main activities

- Developing and implementing the corporate philosophy and managing cultural change as a member of the executive team
- Achieving the national claims operating plan and ensuring the ongoing effectiveness of claims by periodically conducting productivity reviews and implementing appropriate changes
- Providing leadership and driving the growth of insurance business for the company by developing and implementing strategies and plans to maximise sales achievement.
- Managing individual employee input and quality culture through ongoing customer surveys, employee training products and effective HR programs.
- Providing strategic direction to the National/Regional Managers.
- Making a significant contribution to the company's directions, policies administration and strategies.
- Overseeing the effective delivery of customer service strategies.

Key skills

- Broad understanding of the overall business, administration and external market environment both domestically and/or internationally.
- Broad knowledge of all insurance products plus knowledge of competitor activity, future initiatives and international trends.

Internal contacts

Sales and Marketing Staff, Customer Service and Product Development Staff, Accounts and Administration Staff.

External contacts

Major Suppliers and Clients/Customers, Industry Associations.

Typical experience

Extensive business experience, with broad based insurance knowledge, MBA or FAII insurance qualification. Typically has over 20 years in a management role and extensive change management experience.

Other comments

Position Description

Position title:	**National Claims Manager Commercial Liability**
Position code:	**FININS.CL.CLGL.6**
Level:	**6**

Responsible for

Commercial Liability, also known as casualty, including product and 'slip and trip'. Establishing, monitoring and controlling Claims Management systems, standards and techniques to ensure claims, functional and operational units provide an effective, economic and prompt Claims Management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Region/Branch Claims Manager Commercial Liability**
Position code:	**FININS.CL.CLGL.5**
Level:	**5**

Responsible for

Commercial Liability, also known as casualty, including product and 'slip and trip'.
Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Commercial Liability**
Position code:	**FININS.CL.CLGL.4**
Level:	**4**

Responsible for

Commercial Liability, also known as casualty, including product and 'slip and trip'.
Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Consultant - Commercial Liability**
Position code:	**FININS.CL.CLGL.3**
Level:	**3**

Responsible for

Commercial Liability, also known as casualty, including product and 'slip and trip'.
Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Consultant - Commercial Liability**
Position code:	**FININS.CL.CLGL.2**
Level:	**2**

Responsible for

Commercial Liability, also known as casualty, including product and 'slip and trip'.
Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Claims Manager Commercial Motor**
Position code:	**FININS.CL.CLMO.6**
Level:	**6**

Responsible for

Establishing, monitoring and controlling Claims Management systems, standards and techniques to ensure Claims, functional and operational units provide an effective, economic and prompt Claims Management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Region/Branch Claims Manager Commercial Motor**
Position code:	**FININS.CL.CLMO.5**
Level:	**5**

Responsible for

Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Commercial Motor**
Position code:	**FININS.CL.CLMO.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Consultant - Commercial Motor**
Position code:	**FININS.CL.CLMO.3**
Level:	**3**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Consultant - Commercial Motor**
Position code:	**FININS.CL.CLMO.2**
Level:	**2**

Responsible for
Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to
Claims Supervisor/Team Leader.

Supervises
No supervisory responsibilities.

Main activities
- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills
- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts
Claims Department, Underwriting Department, Actuarial Department.

External contacts
Agents, Brokers, Customers, Trustees.

Typical experience
At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Claims Manager Commercial Property**
Position code:	**FININS.CL.CLPR.6**
Level:	**6**

Responsible for

Commercial Property including: Energy, Engineering and Construction.
Establishing, monitoring and controlling Claims Management systems, standards and techniques to ensure claims, functional and operational units provide an effective, economic and prompt Claims Management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Region/Branch Claims Manager Commercial Property**
Position code:	**FININS.CL.CLPR.5**
Level:	**5**

Responsible for

Commercial Property including: Energy, Engineering and Construction.

Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Commercial Property**
Position code:	**FININS.CL.CLPR.4**
Level:	**4**

Responsible for

Commercial Property including: Energy, Engineering and Construction.

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Consultant - Commercial Property**
Position code:	**FININS.CL.CLPR.3**
Level:	**3**

Responsible for

Commercial Property including: Energy, Engineering and Construction.
Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Consultant - Commercial Property**
Position code:	**FININS.CL.CLPR.2**
Level:	**2**

Responsible for

Commercial Property including: Energy, Engineering and Construction.

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Claims Manager Commercial Marine**
Position code:	**FININS.CL.CLMA.6**
Level:	**6**

Responsible for

Marine including: Hull and/or Cargo.

Establishing, monitoring and controlling Claims Management systems, standards and techniques to ensure Claims, functional and operational units provide an effective, economic and prompt Claims Management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Region/Branch Claims Manager Commercial Marine**
Position code:	**FININS.CL.CLMA.5**
Level:	**5**

Responsible for

Marine including: Hull and/or Cargo.

Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Commercial Marine**
Position code:	**FININS.CL.CLMA.4**
Level:	**4**

Responsible for

Marine including: Hull and/or Cargo.

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Consultant - Commercial Marine**
Position code:	**FININS.CL.CLMA.3**
Level:	**3**

Responsible for

Marine including: Hull and/or Cargo.

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Consultant - Commercial Marine**
Position code:	**FININS.CL.CLMA.2**
Level:	**2**

Responsible for

Marine including: Hull and/or Cargo.
Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Claims Manager Specialties - Other**
Position code:	**FININS.CL.CLSL.6**
Level:	**6**

Responsible for

Establishing, monitoring and controlling claims management systems, standards and techniques to ensure claims, functional and operational units provide an effective, economic and prompt claims management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Region/Branch Claims Manager Specialties - Other**
Position code:	**FININS.CL.CLSL.5**
Level:	**5**

Responsible for
Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to
National Claims Manager.

Supervises
Claims Supervisors/Team Leaders.

Main activities
- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills
- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts
Management.

External contacts
Management within the General Insurance Industry, General Counsel as required.

Typical experience
At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Specialties - Other**
Position code:	**FININS.CL.CLSL.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Consultant Specialties - Other**
Position code:	**FININS.CL.CLSL.3**
Level:	**3**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Consultant Specialties - Other**
Position code:	**FININS.CL.CLSL.2**
Level:	**2**

Responsible for

Services: Specialities Other. Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Claims Manager Rural**
Position code:	**FININS.CL.CLCR.6**
Level:	**6**

Responsible for

Services rural clients.Establishing, monitoring and controlling claims management systems, standards and techniques to ensure claims, functional and operational units provide an effective, economic and prompt claims management service.

Report to

General Manager

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

External contacts

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Region/Branch Claims Manager Rural**
Position code:	**FININS.CL.CLCR.5**
Level:	**5**

Responsible for

Services rural clients. Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Rural**
Position code:	**FININS.CL.CLCR.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Consultant - Rural**
Position code:	**FININS.CL.CLCR.3**
Level:	**3**

Responsible for

Services rural clients. Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Consultant - Rural**
Position code:	**FININS.CL.CLCR.2**
Level:	**2**

Responsible for

Services rural clients. Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Claims Manager Personal Lines**
Position code:	**FININS.CL.CLPL.6**
Level:	**6**

Responsible for

Establishing, monitoring and controlling claims management systems, standards and techniques to ensure claims, functional and operational units provide an effective, economic and prompt claims management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Region/Branch Claims Manager Personal Lines**
Position code:	**FININS.CL.CLPL.5**
Level:	**5**

Responsible for

Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Personal Lines**
Position code:	**FININS.CL.CLPL.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Consultant - Personal Lines**
Position code:	**FININS.CL.CLPL.3**
Level:	**3**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Consultant - Personal Lines**
Position code:	**FININS.CL.CLPL.2**
Level:	**2**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Claims Manager Accident & Health**
Position code:	**FININS.CL.CLAH.6**
Level:	**6**

Responsible for

Establishing, monitoring and controlling claims management systems, standards and techniques to ensure claims, functional and operational units provide an effective, economic and prompt claims management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Region/Branch Claims Manager Accident & Health**
Position code:	**FININS.CL.CLAH.5**
Level:	**5**

Responsible for

Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Accident & Health**
Position code:	**FININS.CL.CLAH.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Consultant Accident & Health**
Position code:	**FININS.CL.CLAH.3**
Level:	**3**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Consultant Accident & Health**
Position code:	**FININS.CL.CLAH.2**
Level:	**2**

Responsible for

Services: Accident and Health. Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Claims Manager Life**
Position code:	**FININS.CL.CLLA.6**
Level:	**6**

Responsible for

Establishing, monitoring and controlling claims management systems, standards and techniques to ensure claims, functional and operational units provide an effective, economic and prompt claims management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Region/Branch Claims Manager Life**
Position code:	**FININS.CL.CLLA.5**
Level:	**5**

Responsible for

Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Life**
Position code:	**FININS.CL.CLLA.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Consultant Life**
Position code:	**FININS.CL.CLLA.3**
Level:	**3**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Consultant Life**
Position code:	**FININS.CL.CLLA.2**
Level:	**2**

Responsible for

Services Life. Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Claims Manager Disability**
Position code:	**FININS.CL.CLDI.6**
Level:	**6**

Responsible for

Establishing, monitoring and controlling claims management systems, standards and techniques to ensure claims, functional and operational units provide an effective, economic and prompt claims management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Region/Branch Claims Manager Disability**
Position code:	**FININS.CL.CLDI.5**
Level:	**5**

Responsible for

Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Disability**
Position code:	**FININS.CL.CLDI.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Consultant Disability**
Position code:	**FININS.CL.CLDI.3**
Level:	**3**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Consultant Disability**
Position code:	**FININS.CL.CLDI.2**
Level:	**2**

Responsible for

Services Disabillity. <Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Claims Manager Multi-focus**
Position code:	**FININS.CL.CLMF.6**
Level:	**6**

Responsible for

Establishing, monitoring and controlling claims management systems, standards and techniques to ensure claims, functional and operational units provide an effective, economic and prompt claims management service.

Report to

General Manager.

Supervises

Regional/Branch Claims Managers.

Main activities

- Developing and implementing claims management strategies and plans that reflect the Company's overall business development and profit objectives.
- Formulating and implementing a business strategy that provides improved financial results and a clear strategic direction that reflects the business initiatives of the Company.
- Performing claims quality control, providing guidance and authority to adjusters, and ensuring compliance with all state statutory requirements.
- Providing direction, leadership and training to in-house claims professionals.
- Monitoring ongoing insurance trends and recommending and/or implementing appropriate strategies to address emerging issues and participating in industry-wide forums to represent the company in such matters and to ensure the company remains well informed.
- Monitoring and controlling ongoing claims administration to ensure efficient and appropriate handling of claims and ensuring that recoverable income is maximised through efficient administration and follow-up.
- Managing vendor relations to develop optimum case outcomes, cost performance and measurement criteria.
- Establishing working relationships with Regional/Branch Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.
- Approving substantial claims within appropriate authority levels.
- Developing and implementing policy with regards to fraudulent claims.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Strong management and business skills.
- Ability to negotiate at high levels.
- Excellent interpersonal and communication skills.
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 15 years management experience with 7+ years claims management experience, together with relevant qualifications.

Other comments

This role is different to National Claims Manager - Other Single Lines. This incumbents is responsible for 2 or more lines of insurance.

Position Description

Position title:	**Region/Branch Claims Manager Multi-focus**
Position code:	**FININS.CL.CLMF.5**
Level:	**5**

Responsible for

Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Supervisor/Team Leader Multi-focus**
Position code:	**FININS.CL.CLMF.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

This role is different to Claims Supervisor/Team Leader - Other Single Lines. This incumbent is responsible for 2 or more lines of insurance.

Position Description

Position title:	**Senior Claims Consultant - Multi-focus**
Position code:	**FININS.CL.CLMF.3**
Level:	**3**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

This role is different to Senior Claims Officer - Other Single Lines. This incumbent is responsible for 2 or more lines of insurance.

Position Description

Position title:	**Claims Consultant - Multi-focus**
Position code:	**FININS.CL.CLMF.2**
Level:	**2**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 1 - 2 years experience in insurance, together with relevant qualifications.

Other comments

This role is different to Claims Officer - Other Single Lines. This incumbent is responsible for 2 or more lines of insurance.

Position Description

Position title:	**Claims Administrator**
Position code:	**FININS.CL.CLMF.1**
Level:	**1**

Responsible for

Providing day to day administrative support to the Claims function.

Report to

Claims Manager.

Supervises

No supervisory responsibilities.

Main activities

- Assisting with ad hoc duties on behalf of Claims Assessors.
- Maintaining and updating files for use within the Claims Department.
- Entering data into company Claims Systems as required.
- Compiling historical information from company files on behalf of Claims Assessors.
- Answering all general phone enquiries.

Key skills

- Organisational ability.
- Administration skills.
- Good computer skills.
- Good communication skills.

Internal contacts

Claims department, Underwriters.

External contacts

Suppliers, Customers.

Typical experience

Limited commercial experience, will typically have completed Year 12.

Other comments

This is an entry level position.

Position Description

Position title:	**Claims/Fraud Investigation Manager Multi-Focus**
Position code:	**FININS.CL.IFMF.5**
Level:	**5**

Responsible for

Maintaining a specialist investigations unit which provides cost effective fraud prevention, detection and investigation services.

Report to

Chief Claims Officer, National Claims Manager

Supervises

Claims/Fraud Team

Main activities

- Investigating suspicious and fraudulent claims.
- Developing a highly skilled investigations team
- Developing anti-fraud strategies and policies and creating a high level of awareness within the organisation.
- Liaising with police, witnesses, solicitors, claimants etc.
- Compiling briefs and statistical reports.
- Managing and controlling activities and workload for the area.

Key skills

- Strong leadership skills.
- Strong communication skills.
- Presentation and negotiation skills.
- Knowledge of general insurance, claims processes and legal environment.

Internal contacts

Claims Department, Billing and Finance

External contacts

Customers, Solicitors, Collection Agencies, Credit Reference Agencies, Police Department.

Typical experience

Management experience. Qualifications and experience in investigations.

Other comments

Position Description

Position title:	**Claims/Fraud Investigation Team Leader Multi-Focus**
Position code:	**FININS.CL.IFMF.4**
Level:	**4**

Responsible for

Ensuring that losses due to fraud are minimised, through early detection and Team management.

Report to

Claims/Fraud Investigation Manager

Supervises

Fraud Analysts.

Main activities

- Supervising, supporting and managing team members.
- Reviewing high risk applications generated in the customer acquisition process.
- Analysing call traffic and account data to identify high risk and out of pattern usage and investigating anomalies.
- Interpreting data and detecting in a timely manner instances of Fraud in order to reduce losses from such risk.
- Acting to limit losses once a Fraud/risk has been detected.
- Selecting and implementing the appropriate action to combat Fraud/high risk exposure.
- Arranging constant monitoring for high/abnormal usage.
- Managing the customer account including liaison with applicable internal departments to successfully conclude Fraud investigations.
- Reporting to management on Fraud levels and improving Fraud prevention and detection.
- Actively reviewing procedure and policy and identifying potential process improvements in relation to Fraud and risk management.

Key skills

- Ability to interpret data and generate solutions.
- Extensive experience and knowledge of billing, service provision and credit management systems.
- Excellent negotiation and communication skills
- Excellent planning and time management skills.
- Attention to detail
- Ability to manage a team effectively.

Internal contacts

Claims Department, Billing and Finance

External contacts

Customers, Solicitors, Collection Agencies, Credit Reference Agencies, Police Department.

Typical experience

5+ years experience in fraud investigations and knowledge of general insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims/Fraud Investigator**
Position code:	**FININS.CL.IFMF.3**
Level:	**3**

Responsible for

Providing fraud prevention, detection and investigation services.

Report to

Claims/Fraud Investigation Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Conducting full investigations related to insurance fraud, to include surveillance, activity checks, background checks, locates and statements.
- Preparing brief reports and statistical data and submitting.
- Testifying at hearings as required.
- Creating a high level of awareness amongst Staff in anti fraud strategies and policies.
- Liaising with Police, Solicitors of Witnesses and Claimants.

Key skills

- Strong communication skills.
- Presentation and negotiation skills.
- Ability to manage own caseload and work independently.

Internal contacts

Claims department.

External contacts

Police, Solicitors of Witnesses, Claimants.

Typical experience

At least 3-4 years experience in fraud related industries and knowledge of general insurance, together with relevant qualifications.

Other comments

Position Description

Position title:	**Technical Claims Consultant**
Position code:	**FININS.CL.TMMF.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Technical Claims Manager**
Position code:	**FININS.CL.TMMF.5**
Level:	**5**

Responsible for

Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Quality Manager Multi-Focus**
Position code:	**FININS.CL.CYMF.5**
Level:	**5**

Responsible for

Planning, controlling and maintaining the provision of cost effective claims management services in assigned state, region or zone to optimise service levels and contribute to profit.

Report to

National Claims Manager.

Supervises

Claims Supervisors/Team Leaders.

Main activities

- Implementing claims management strategies and objectives for the State, Region or Branch.
- Ensuring legitimate claims are paid in accordance with policy conditions by providing technical expertise and leadership.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Ensuring that overall Company/Branch policies and procedures are implemented effectively within the State, Region or Branch.
- Implementing changes to existing claims administration systems and procedures as directed.
- Monitoring and providing technical support to ongoing claims activities, ensuring that prompt and quality service is provided.
- Ensuring that recoverable amounts are assessed and effectively followed up, and approving significant claims within written authority levels.
- Working with National Claims Managers and General Counsels on claims related issues, including strategic loss reduction initiatives.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Effective management and business skills.
- Good interpersonal and communication skills.
- Sound knowledge of claims administration procedures and related systems
- Strong analytical and presentation skills.
- Strong customer service focus.

Internal contacts

Management.

External contacts

Management within the General Insurance Industry, General Counsel as required.

Typical experience

At least 10 years management experience with 5+ years claims management experience, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Quality Team Leader Multi-Focus**
Position code:	**FININS.CL.CYMF.4**
Level:	**4**

Responsible for

Directly supervises the activities of the assigned claims unit and provides advice to Claims Officers on general Company claims policy.

Report to

Region/Branch Claims Manager.

Supervises

Claims Officers.

Main activities

- Supervising of the investigation and settlement of all claims within the Team.
- Reviewing and settling of problematic cases, but otherwise extending settlement authority to subordinates.
- Providing ongoing technical support to junior Claims Officers through: assisting with claims administration; counselling and coaching; and reviewing work outputs.
- Following-up on all reinsurance/recovery claims to ensure that the Company recovers claims costs where appropriate.
- Handling of complaints and investigations of suspicious/fraudulent insurance claims.
- Implementing and maintaining claims management strategies and objectives.
- Ensuring that the Company remains fully informed and receptive to change by monitoring industry/market and legal trends and providing recommendations for change strategies.
- Working closely with and training new Claims Officers.
- Undertaking the performance appraisal process, providing feedback and improving individual adjuster performance.

Key skills

- Good interpersonal and communication skills.
- Leadership skills.
- Effective organisation skills.
- Strong customer service focus.
- Sound knowledge of claims administration procedures and related systems

Internal contacts

Management and Claims Officers.

External contacts

Clients and Customers.

Typical experience

At least 5 years management experience preferably in claims management, together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Quality Analyst Multi-Focus**
Position code:	**FININS.CL.CYMF.3**
Level:	**3**

Responsible for

Providing delivery of superior claims service, determining proper policy coverage to conclude, investigate, evaluate and negotiate assigned cases.

Report to

Claims Supervisor/Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Receiving, recording and processing all incoming insurance claims for assigned area.
- Interpreting basic policy coverage's and determining if coverage's apply to claims submitted, escalating issues as needed.
- Setting reserves and authorising payment within scope of authority, settling claims in the most cost effective manner and ensuring timely issuance of disbursements.
- Recognising need for negotiation and participating in planning strategy and negotiating within scope of authority.
- Identifying suspicious or potentially fraudulent claims, notifying supervisor, arranging investigation and briefing solicitors if further action is to be taken.
- Providing information and feedback on claims activity and developing trends to underwriters/risk assessors to enable appropriate actions to be carried out.
- Maintaining current knowledge of insurance guidelines, court decisions impacting claims functions, and policy changes and modifications and recommending changes to Company policies and procedures.
- Assisting/preparing files for suit, trial or subrogation and submitting administrative reports as required.
- Providing technical expertise and mentoring to assist the development of Junior Claims Officers.

Key skills

- Broad knowledge of insurance industry and claims processes.
- Excellent analytical and negotiation skills.
- Strong organisational and written/verbal communication skills.

Internal contacts

Claims Department, Underwriting Department, Actuarial Department.

External contacts

Agents, Brokers, Customers, Trustees.

Typical experience

At least 3 years experience in insurance and at least one year of this spent in claims management , together with relevant qualifications.

Other comments

Position Description

Position title:	**Claims Recovery Manager**
Position code:	**FININS.CL.SUMF.5**
Level:	**5**

Responsible for

Managing the Recoveries Department and achieving key outcomes in all third party Claims related matters, through effective performance management of staff.

Report to

Finance Manager

Supervises

Claims Recovery Officers and Team Leaders

Main activities

- Coaching team members to maximise rate of recovery amounts from responsible third parties.
- Coaching team members to ensure negotiation and settlement with third parties consistent with common law principles of contributory negligence and relevant legislation, and in accordance with company policy.
- Identifying third party recovery potential based on application of common law principles of negligence / contributory negligence.
- Ensuring costs incurred on liability Claims are related and mitigated.
- Authorising payments to clients, third parties, insurers and/or legal representatives.
- Instructing agents where necessary and overseeing their management of the investigation.
- Referring complex Claims and issues to management.
- Maintaining a standard of work that complies with policy, procedural and legislative requirements.

Key skills

- Proven leadership skills and the ability to achieve operational targets through your team.
- Demonstrate-able practical experience in the administration of Claims and the application of legislation.
- Ability to conduct negotiations with internal and external parties to achieve optimal outcomes.
- Highly developed verbal and written communication skills.
- Policy product knowledge and interpretation.
- Persuasive and influential skills.

Internal contacts

Claims; Finance; Legal.

External contacts

Clients; Solicitors

Typical experience

7+ years experience coupled with relevant qualifications and leadership experience.

Other comments

Position Description

Position title:	**Claims Recovery Team Leader**
Position code:	**FININS.CL.SUMF.4**
Level:	**4**

Responsible for

Assisting the Recoveries Department in achieving key outcomes in all third party Claims related matters, through effective performance management of staff.

Report to

Recoveries Manager, Credit Manager, Finance Manager.

Supervises

Claims Recovery Officers.

Main activities

- Coaching team members to maximise rate of recovery amounts from responsible third parties.
- Coaching team members to ensure negotiation and settlement with third parties consistent with common law principles of contributory negligence and relevant legislation, and in accordance with company policy.
- Identifying third party recovery potential based on application of common law principles of negligence / contributory negligence.
- Ensuring costs incurred on liability Claims are related and mitigated.
- Authorising payments to clients, third parties, insurers and/or legal representatives.
- Instructing agents where necessary and overseeing their management of the investigation.
- Referring complex Claims and issues to management.
- Maintaining a standard of work that complies with policy, procedural and legislative requirements.

Key skills

- Proven leadership skills and the ability to achieve operational targets through your team.
- Demonstrate-able practical experience in the administration of Claims and the application of legislation.
- Ability to conduct negotiations with internal and external parties to achieve optimal outcomes.
- Highly developed verbal and written communication skills.
- Policy product knowledge and interpretation.
- Persuasive and influential skills.

Internal contacts

Claims; Finance; Legal.

External contacts

Clients; Solicitors.

Typical experience

5+ years experience coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Claims Recovery Consultant**
Position code:	**FININS.CL.SUMF.3**
Level:	**3**

Responsible for

Maximising the Recovery of debt through diligent and effective actioning of an assigned portfolio of debt files.

Report to

Claims Recovery Team Leader.

Supervises

No supervisory responsibility.

Main activities

- Reviewing incoming files for liability and entering potentially recoverable files into the computer system.
- Pursuing and negotiating either verbally or through written communication with a debtor and/or their advisers a satisfactory conclusion regarding outstanding debts.
- Maximising the rate of recovery amounts from responsible third parties.
- Maintaining and administering files detailing the status of debtors financial affairs.
- Instructing Solicitors on the action to be taken for Recovery of debt as authorised by Management and corresponding with debtors and their counsel as required.
- Negotiating and settling with third parties of the organisation's insured’s liability consistent with common law principles of contributory negligence and relevant legislation / acts, and in accordance with company policy.
- Making payments to clients, third parties, insurers and/or legal representatives within authority limits.
- Liaising with customers/intermediaries/business units.
- Conducting inquiries/searches to locate missing debtors.
- Referring complex claims to Team Leader.

Key skills

- Comprehensive knowledge of collection procedures.
- Effective negotiation and communication skills.
- Working knowledge of legislation affecting collections.
- Comprehensive knowledge of liability issues and electronic debt collection system.
- Time management and analytical skills.

Internal contacts

Claims; Finance; Legal.

External contacts

Debtors or their representatives, Solicitors and Trustees.

Typical experience

3+ years experience in industry. Degree or AAII qualification or studying towards the same.

Other comments

Position Description

Position title:	**Claims Recovery Consultant**
Position code:	**FININS.CL.SUMF.2**
Level:	**2**

Responsible for

Maximising the Recovery of debt through diligent and effective actioning of an assigned portfolio of debt files.

Report to

Claims Recovery Team Leader.

Supervises

No supervisory responsibilities.

Main activities

- Reviewing incoming files for liability and entering potentially recoverable files into the computer system.
- Pursuing and negotiating either verbally or through written communication with a debtor and/or their advisers a satisfactory conclusion regarding outstanding debts.
- Maximising the rate of recovery amounts from responsible third parties.
- Maintaining and administering files detailing the status of debtors financial affairs.
- Instructing Solicitors on the action to be taken for Recovery of debt as authorised by Management and corresponding with debtors and their counsel as required.
- Negotiating and settling with third parties of the organisation's insured’s liability consistent with common law principles of contributory negligence and relevant legislation / acts, and in accordance with company policy.
- Making payments to clients, third parties, insurers and/or legal representatives within authority limits.
- Liaising with customers/intermediaries/business units.
- Conducting inquiries/searches to locate missing debtors.
- Referring complex claims to Team Leader.

Key skills

- Comprehensive knowledge of collection procedures.
- Effective negotiation and communication skills.
- Working knowledge of legislation affecting collections.
- Comprehensive knowledge of liability issues and electronic debt collection system.
- Time management and analytical skills.

Internal contacts

Claims; Finance; Legal.

External contacts

Debtors or their representatives, Solicitors and Trustees.

Typical experience

1-3+ years experience in industry. Degree or AAII qualification or studying towards the same.

Other comments

Position Description

Position title:	**Contact Centre General Manager**
Position code:	**FINFIN.CR.CCMF.6**
Level:	**6**

Responsible for

Lead inbound and outbound contact centre functions to deliver sales and service propositions which align with business and channel strategies, achieving customer satisfaction and financial objectives.

Report to

Customer Operations Director.

Supervises

Contact Centre Managers

Main activities

- Deliver customer service, achieving coordination of day to day operations through subordinate managers. Operating and developing the contact centre and offering service delivery to meet the needs of customers.
- Develop short and long-term plans for the contact centre delivering direction, process improvement, human resource capability and organisation support.
- Represent Customer Operations with Sales and Marketing working with business leaders to ensure support of strategies through the delivery of sales and service propositions in a tiered support environment.
- Work with managers to clearly identify and define their responsibilities, developing key performance indicators/goals to ensure effective and efficient operation of the contact centre.
- Undertake regular one to one meetings, team meetings, training and counselling/coaching sessions for all direct reports, conducting regular performance appraisals and remuneration reviews.
- Develop, manage and report on functional budgets including delegating budgetary responsibility and cost centre management to direct reports as appropriate.
- Contribute to the wider Customer Operations/Contact Centre resource and capability strategy.
- Act as a lead change agent for Customer Operations ensuring all change initiatives are planned, structured and deliver overall business objectives.

Key skills

- Proven Contact Centre management experience, including a clear understanding of Contact Centre and CRM packages and technology.
- Developed skills in planning and organising large service delivery functions.
- An ability to think and act at a strategic level.
- Financial management, including budget creation and management.
- Ability to influence customers at the highest level.
- Ability to train, motivate and provide feedback to staff in a team environment.
- Well developed negotiation, facilitation, communication and presentation skills.

Internal contacts

Customer Operations/Support Managers, Sales and Marketing management teams, Operations and Logistics Managers, Systems and Software Development staff.

External contacts

Customers at senior management level, prospects, distributors, sub-contractors and outsource suppliers.

Typical experience

At least 10+ years experience in customer service management, coupled with a relevant tertiary business qualification.

Other comments

Position Description

Position title:	**Contact Centre Manager**
Position code:	**FINFIN.CR.CCMF.5**
Level:	**5**

Responsible for

Managing Customer Centre teams to ensure efficient service to customers and advisers via telephone and correspondence inquiries.

Report to

General Manager, Customer Service.

Supervises

Contact Centre Team Leaders and Representatives.

Main activities

- Operating and developing the Contact Centre and offering service delivery to meet the needs of customers across all contact channels. Managing the daily operation of the Contact Centre to ensure service delivery standards are met and maintained in line with company defined objectives.
- Ensuring customer complaints are actioned and resolved as per Customer Service guidelines.
- Work with team managers to clearly define their responsibilities and develop key performance indicators/goals to ensure effective and efficient operation of the Contact Centre.
- Understanding the regulatory, fair trading and competition rules relating to the role enough to be able to comply with them. Seeking Specialist support where appropriate.
- Actively supporting company policy and best practice in the area of security, with particular emphasis of protection of sensitive customer information.
- Analysing performance, highlighting problem areas and identifying improvement actions.
- Driving improvement projects to improve performance against targets.
- Undertaking regular one-to-one meetings, team meetings (where feasible), training and counselling/coaching sessions for all direct reports, conducting regular performance appraisals and remuneration reviews.
- Budgetary management.
- Liaise with marketing departments regarding launch of new products/services. Manage the impact of new products and services on levels of customer service.

Key skills

- Ability to train, motivate and provide feedback to staff in a team environment.
- Negotiation, facilitation and communication skills.
- Planning and organisational skills.
- Budgetary creation and management.

Internal contacts

Senior Management.

External contacts

Clients.

Typical experience

Usually at least 5-8 years of industry experience.

Other comments

Position Description

Position title:	**Customer Service Team Leader/Senior Product Advisor**
Position code:	**FINFIN.CR.CCMF.4**
Level:	**4**

Responsible for

Managing a team to ensure that customer and adviser contact is handled in a professional manner to assist in preserving and initiating business.

Report to

Contact Centre Manager.

Supervises

Contact Centre Officers.

Main activities

- Ensuring appropriate responses to all customer and Agent requests/queries within timeframes and service levels.
- Dealing with complex telephone and written inquiries.
- Recruiting, training and developing staff.
- Helping formulate and achieve team goals.
- Reviewing procedures to ensure efficiency of operation.
- Playing an active role in considering new technologies and new work practices.

Key skills

- Ability to train, motivate and provide feedback to staff in a team environment.
- Good facilitation and communication skills.
- Ability to plan and organise in a team environment.
- Ability to work under pressure.
- Ability to actively participate in or to lead group meetings.

Internal contacts

Internal Processing Areas.

External contacts

Clients.

Typical experience

A minimum of 5 years experience in a Customer Service environment.

Other comments

Position Description

Position title:	**Product Advisor**
Position code:	**FINFIN.CR.CCMF.3**
Level:	**3**

Responsible for

Consulting customers regarding support of various products, conducting product demonstrations, maintaining general after-sales support and identifying and passing on sales leads.

Report to

Customer Support Manager/Sales Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing clients with product knowledge to ensure optimum utilisation of the organisation's products, and suggesting the use of additional products offered by the organisation where applicable.
- Conducting product training for clients and staff.
- Responding to customer enquiries.
- Assisting customers with the initial usage of products and ongoing problem resolution.
- Investigating, resolving or escalating all client complaints in a timely fashion.
- Recommending the purchase of products offered by the organisation where applicable or identifying sales opportunities for follow up by Sales Representatives.

Key skills

- Strong Customer Service orientation and an understanding of the sales environment.
- Excellent presentation and communication skills.
- Product demonstration skills, coupled with training and public speaking ability.
- Knowledge of organisation's products.
- Ability to identify sales leads and on-sell.

Internal contacts

Customer Service staff, Sales staff, Finance and Administration staff, Technical Support staff.

External contacts

Customers, Product Vendors.

Typical experience

5+ years of experience in the relevant industry.

Other comments

Position Description

Position title:	**Senior Customer Service Consultant**
Position code:	**FINFIN.CR.CCMF.2**
Level:	**2**

Responsible for

Consulting customers regarding support of various products, conducting product demonstrations and maintaining general after-sales support.

Report to

Customer Support Manager/Sales Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing clients with product knowledge to ensure optimum utilisation of the organisation's products.
- Conducting product training for clients and staff.
- Responding to customer enquiries.
- Assisting customers with initial usage of products and ongoing problem resolution.
- Investigating, resolving or escalating all client complaints in a timely fashion.
- Identifying sales opportunities for follow up by Sales Representatives.

Key skills

- Strong Customer Service orientation.
- Excellent presentation and communication skills.
- Product demonstration skills, coupled with training and public speaking ability.
- Knowledge of organisation/industry products.
- Ability to identify sales leads.

Internal contacts

Customer Service staff, Sales staff, Finance and Administration staff, Technical Support staff.

External contacts

Customers, Product Vendors.

Typical experience

At least 2 years of experience in the relevant industry.

Other comments

Position Description

Position title:	**Customer Service Consultant**
Position code:	**FINFIN.CR.CCMF.1**
Level:	**1**

Responsible for

Answering customer inquiries from a particular contact channel accurately and within agreed service times in a professional customer focused manner.

Report to

Contact Centre Team Leader - Inbound.

Supervises

No supervisory responsibilities.

Main activities

- Responding to incoming inquiries offering exceptional customer services regarding the organisation's products and services.
- Using on-line systems to access data and answer customer inquiries within service times.
- Entering customer requests/queries on-line.
- Liaising with other internal areas to provide answers for customers.
- Maintaining statistics for complaints/inquiries.
- Ensuring Agents are advised of any customer inquiries.
- Helping formulate and achieve goals.
- Liaising with Agents on customer inquiries and complaints and escalating issues when necessary.
- Discretion to provide account credits in line with pre-established guidelines.

Key skills

- Excellent telephone manner.
- Good numeric and communication (both oral and written) skills.
- Proficient computer skills.
- Good interpersonal and team skills.

Internal contacts

Internal Processing Areas.

External contacts

Clients.

Typical experience

Experience in a Customer Service environment.

Other comments

Position Description

Position title:	**Chief Medical Officer Multi-Focus**
Position code:	**FININS.DR.DRMF.7**
Level:	**7**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Head of Clinical Advisory Multi-Focus**
Position code:	**FININS.DR.DRMF.6**
Level:	**6**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Senior Medical Advisor Multi-Focus**
Position code:	**FININS.DR.DRMF.5**
Level:	**5**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Medical Advisor Multi-Focus**
Position code:	**FININS.DR.DRMF.4**
Level:	**4**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Clinical Case Manager Multi-Focus**
Position code:	**FININS.DR.DRMF.3**
Level:	**3**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Clinical Coder Multi-Focus**
Position code:	**FININS.DR.DRMF.2**
Level:	**2**

Responsible for

To support the Clinical Case Manager and deliver the best possible customer outcome and value proposition.

Report to

Clinical Case Manager

Supervises

n/a

Main activities

- Contribute to internal discussion on the drivers of claims inflation including how utilization management and flexible care coordination packages and discharge planning may and can play a part.
- Liaise frequently with the clinical advisory panel and form strong relationships.
- Develop optimal engagement with primary care.
- Develop internal processes where procedures of questionable clinical benefit can be identified and actioned.
- Work with the Provider Contracting Manager to assist in the design and implementation of optimal provider funding models.Develop close relationships with key individuals in competitor health funds and other third party entities to understand competitor offerings and potential for collaboration where appropriate and desired

Key skills

- Planning & organising.
- Problem Solving
- Building Relationships
- Communication

Internal contacts

Hospital Analyst, General & Medical Analyst, Compensation Analyst

External contacts

External Customers

Typical experience

2-4 work experience coupled relevant tertiary qualification.

Other comments

Position Description

Position title:	**Head of Clinical Governance Multi-Focus**
Position code:	**FININS.DR.CGMF.6**
Level:	**6**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Clinical Governance Manager Multi-Focus**
Position code:	**FININS.DR.CGMF.5**
Level:	**5**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Clinical Governance Advisor Multi-Focus**
Position code:	**FININS.DR.CGMF.4**
Level:	**4**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Head of Compliance**
Position code:	**FININF.CP.CCMF.6**
Level:	**6**

Responsible for

Ensuring all external regulatory frameworks and policies are complied with by the business operations within reasonable risk and parameters.

Report to

General Manager.

Supervises

State Compliance Managers.

Main activities

- Identifying all appropriate external regulatory and compliance frameworks and ensuring compliance by the business.
- Developing and recommending compliance policy and processes which are adequate to meet all organisational compliance and policy obligations.
- Planning and managing the implementation of compliance policies.
- Selecting and maintaining appropriate risk identification and measurement methodologies.
- Promoting appropriate compliance behaviour and culture by the effective communication and dissemination of compliance strategy policy and processes.
- Developing and implementing a program to ensure that all employees and intermediaries comply with compliance policy and processes.
- Providing a quarterly report on compliance adequacy.
- Identifying and providing developmental compliance training to all staff.

Key skills

- Knowledge of relevant legislation.
- Good interpersonal and communication skills.
- Good technical and analytical skills.

Internal contacts

Legal, Managers and Staff.

External contacts

Industry Organisations and Solicitors.

Typical experience

At least 8 - 10 years of experience in a commercial legal role coupled with a law degree or equivalent qualification.

Other comments

Position Description

Position title:	**Compliance Manager**
Position code:	**FININF.CP.MAMF.5**
Level:	**5**

Responsible for

Establishing and implementing Compliance policies and procedures to ensure the organisation operates within legal and regulatory requirements.

Report to

General Manager, Manager - Legal and Compliance.

Supervises

A team of Compliance Specialists.

Main activities

- Ensuring Compliance with trust, legal and regulatory requirements.
- Coordinating the preparation and submission of reports in relation to the status of Compliance.
- Advising Managers and the Legal department on areas of non-compliance.
- Maintaining effective liaison with relevant regulators.

Key skills

- In-depth understanding of the legal and regulatory environment impacting on the organisation.
- High level skills in written and oral communications.
- Excellent analytical and report writing skills.

Internal contacts

Legal, General Manager, other department Managers.

External contacts

Relevant Industry and Government bodies, external Consultants.

Typical experience

At least 8-10 years of industry experience, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Compliance Officer**
Position code:	**FININF.CP.MAMF.4**
Level:	**4**

Responsible for

Providing specialist technical advice to a particular business function in the development and ongoing maintenance of the Compliance Program.

Report to

Compliance Manager.

Supervises

No supervisory responsibilities, may mentor Junior Compliance Officers.

Main activities

- Promoting and participating in the development of a high quality Compliance Program and the necessary training.
- Assisting in the identification, preparation and development of appropriate training materials.
- Identifying risk areas and facilitating means to remove or better manage those areas by providing Compliance advice.

Key skills

- Excellent understanding of organisations Compliance program.
- Good knowledge of regulation and legislation affecting the organisation.
- Reasonable knowledge of organisations policy and procedures.

Internal contacts

Legal, Managers and staff.

External contacts

Assessors/Investigators and solicitors.

Typical experience

5+ years of business experience coupled with Legal or Business tertiary qualification .

Other comments

Position Description

Position title:	**Compliance Officer**
Position code:	**FININF.CP.MAMF.3**
Level:	**3**

Responsible for

Providing regulatory advice, support and establishing standards and specifications for all company products/services that have to comply with Government Regulations.

Report to

Regulatory Affairs Manager or Compliance Manager

Supervises

No supervisory responsibilities.

Main activities

- Assisting with the establishment and coordination of all relevant legislative, regulatory, contractual and other compliance processes.
- Assisting in the planning and preparation of submissions to the relevant Government Authorities on product specifications.
- Assisting in the development and maintenance of regulatory policies, procedures and compliance programs.
- Recommending changes to product specifications in line with statutory requirements.
- Arranging re-registration of existing product lines and following up on product applications to ensure timely approval.
- Assisting in the development of regulatory reports for regional and overseas offices where applicable.
- Assisting in the researching and sourcing of political/industry information to ensure the group is at the forefront of regulatory management.
- Assisting with the roll-out and maintenance of compliance related software systems to manage compliance obligations.
- Assisting with risk management and risk reporting activities as required.
- Providing support for contract management/administration as required.

Key skills

- Good communication skills.
- Ability to interpret relevant regulatory legislation.
- Knowledge of political and economic structures of key global economies.

Internal contacts

Staff in all Departments.

External contacts

Commonwealth and State Government Officials, Regulatory Authorities and Industry Associations.

Typical experience

At least 3 - 5 years of legal or compliance experience in a commercial environment together with relevant qualifications in law, business, commerce or equivalent. May also have come from a risk management or contract administration background.

Other comments

Position Description

Position title:	**General Manager/Head of Retail Banking**
Position code:	**FINCNB.LE.FNMF.7**
Level:	**7**

Responsible for

Managing a variety of diverse functional activities or branches operating separately as autonomous profit centres under policy control. People performing this role have multiple functional responsibilities and are responsible for implementing strategy within these particular areas of responsibility.

Report to

Chief Executive Officer/Managing Director or Chief Operating Officer.

Supervises

Those managers and staff working within the functional areas/branches.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall financial performance of the multiple functions/branches in retail banking and the achievement of associated revenue and expense budgets.
- Ensuring that the functions/branches comply with senior management directives and statutory regulations.
- Directing and motivating subordinate managers to achieve agreed targets.
- Managing and motivating all divisional personnel.
- Acting as the chief spokesperson for the organisation in relation to the multi functions/branches or responsibility - as required.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Branch, sales and customer service management and staff.

External contacts

Clients/customers, suppliers, industry associations.

Typical experience

At least 12 to 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

Position Description

Position title:	**Regional Manager - Retail Banking**
Position code:	**FINCNB.BD.BLRM.6**
Level:	**6**

Responsible for

Managing the branch network within a region profitably and in accordance with the organisation's policy and procedure outline.

Report to

National Manager

Supervises

Branch Managers

Main activities

- Coordinating the activities of retail branches to achieve profit, administrative, sales and marketing plans/targets for the Region.
- Preparing targets and objectives for the Region and providing regular reporting feedback to Head Office as to actual progress to targets (budgets) outlining reasons for variances.
- Approving larger loans in the Region within discretionary limits.
- Controlling the quality of all services offered in the region by effective direction of staff, monitoring the maintenance of correct procedures and taking corrective action.
- Maintaining and developing the team's skills within the region which includes the coordination of recruitment, training and development, performance assessment and reward.
- Being accountable for the maintenance of the organisation's policies and procedures within the region, within prescribed limits of approval especially with regard to lending.
- Interacting regularly with other operating and service divisions.

Key skills

- Sound management ability.
- Proven track record in achieving business targets.
- Good communication and interpersonal skills.
- Strong people management skills.

Internal contacts

Other Regional Managers, Branch Managers, Sales and Marketing Staff, Customer Service and Product Development staff, Accounts and Administration staff.

External contacts

Customers, industry groups, property developers, insurers, Government departments, other financial institutions.

Typical experience

Requires 10 to 15+ years extensive experience in all operating aspects. Staff management experience is essential. A professional qualification e.g. C.P.A. may apply.

Other comments

Position Description

Position title:	**Branch Manager large (>12 staff)**
Position code:	**FINCNB.BD.BSFL.5**
Level:	**5**

Responsible for

Managing the activities of a large branch (> 12 staff) to achieve branch profit and other targets (objectives).

Report to

Regional Manager

Supervises

Retail Banking staff

Main activities

- Ensuring emphasis on efficient customer service at all time resulting in prompt, courteous and efficient processing of all transactions.
- Ensuring the quality of lending, credit management and control of bad debts within the Branch is maintained to required standards.
- Approving loans within authority/discretionary limits and referring larger amounts through relevant channels for approval.
- Maintaining and developing the personal skills of all staff in the branch to maximise target achievement. This role will include recruitment, training and development, reward and performance assessment.
- Being accountable for the maintenance of the organisation's policies and procedures within prescribed limits of approval for the branch.
- Submitting all required reports concerning branch operations promptly and accurately.
- Ensuring all branch and customer records and assets are safeguarded. Continually monitoring and improving office processing, procedures and documentation.
- Actively promoting the organisation's product range and developing the business activities of the branch through continual customer contact.

Key skills

- Effective management skills.
- Excellent knowledge of Branch operations.
- Excellent communication skills.

Internal contacts

Head Office Support staff.

External contacts

Major customers, developers, insurers, Government and local authority departments, other financial institutions.

Typical experience

At least 7 years experience in all branch operations. Experience in some specialised products within a large banking environment.

Other comments

Position Description

Position title:	**Branch Manager small/medium (<12 staff)**
Position code:	**FINCNB.BD.BSMB.5**
Level:	**5**

Responsible for

Managing the activities of an small branch (<6 staff) to achieve branch profit and other targets (objectives).

Report to

Regional Manager

Supervises

Retail Banking staff

Main activities

- Ensuring emphasis on efficient customer service at all time resulting in prompt, courteous and efficient processing of all transactions.
- Ensuring the quality of lending, credit management and control of bad debts within the Branch is maintained to required standards.
- Approving loans within authority/discretionary limits and referring larger amounts through relevant channels for approval.
- Maintaining and developing the personal skills of all staff in the branch to maximise target achievement. This role will include recruitment, training and development, reward and performance assessment.
- Being accountable for the maintenance of the organisation's policies and procedures within prescribed limits of approval for the branch.
- Submitting all required reports concerning branch operations promptly and accurately.
- Ensuring all branch and customer records and assets are safeguarded. Continually monitoring and improving office processing, procedures and documentation.
- Actively promoting the organisation's product range and developing the business activities of the branch through continual customer contact.

Key skills

- Effective management skills.
- Excellent knowledge of Branch operations.
- Excellent communication skills.

Internal contacts

Head Office Support staff.

External contacts

Major customers, developers, insurers, Government and local authority departments, other financial institutions.

Typical experience

5-7+ years experience in all branch operations.

Other comments

Position Description

Position title:	**Senior Personal Banker**
Position code:	**FINCNB.BD.BSPE.4**
Level:	**4**

Responsible for

Acting as a advisor to sell complex products (such as home loans or higher levels of credit) to best suit the customer needs. Identifying potential customer leads.

Report to

Branch Manager

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Providing customers with a tailored service around an organisation's complex product offering.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer’s needs.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Actively building relationships around the business that support branch initiatives.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Customer service focus.
- In-depth complex Product knowledge/Technical knowledge of banking systems.
- Communication and interpersonal skills.

Internal contacts

Head Office Support staff.

External contacts

Customers.

Typical experience

At least 4-5 years of experience in all aspects of branch transactions as well as the ability to present and promote the organisation's complex product line.
AFA Qualified.

Other comments

Position Description

Position title:	**Personal Banker**
Position code:	**FINCNB.BD.BSPE.3**
Level:	**3**

Responsible for

Acting as a advisor to sell products (such as personal loans and credit card lending) to best suit the customer needs.
Identifying potential customer leads.

Report to

Branch Manager

Supervises

No supervisory responsibilities.

Main activities

- Providing customers with a tailored service around an organisation's complex product offering.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer's needs.
- Maintaining a high standard of customer service and personal presentation.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Actively build relationships around the business that support branch initiatives.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Customer service focus.
- In-depth complex Product knowledge/Technical knowledge of banking systems.
- Communication and interpersonal skills.

Internal contacts

Head Office Support staff.

External contacts

Customers.

Typical experience

At least 2-3 years of experience in all aspects of branch transactions as well as the ability to present and promote the organisation's product line.
AFA Qualified.

Other comments

Position Description

Position title:	**Team Leader - Retail Banking**
Position code:	**FINCNB.BD.CSMF.4**
Level:	**4**

Responsible for

Supervising a team of staff in a branch environment and the daily routine financial transactions.

Report to

Branch Manager

Supervises

Customer service consultants

Main activities

- Supervising staff to ensure the correct maintenance of branch procedures particularly in relation to reconciling cash on hand with the various daily financial transactions.
- Providing workplace training for staff, monitoring performance and providing counsel and guidance in difficult situations.
- Handling more difficult customer queries.
- Normal counter duties as part of the responsibility.
- May also share the keeping of keys and to be responsible for security procedures.
- Responsible for all cash held on branch premises.
- Daily balancing and banking of cash.

Key skills

- Strong interpersonal and communication skills.
- Supervisory skills.

Internal contacts

Counter staff, Support staff.

External contacts

Customers.

Typical experience

At least 4 - 5 years experience in a Branch environment.
May be AFA Qualified.

Other comments

Position Description

Position title:	**Senior Customer Service Consultant**
Position code:	**FINCNB.BD.CSMF.2**
Level:	**2**

Responsible for

Providing in branch customer service across a range of queries

Report to

Branch Manager or Team Leader - Retail Banking

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Providing an efficient service to customers by prompt and accurate processing of transactions.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer’s needs.
- Maintaining a high standard of customer service and personal presentation.
- Building long term relationships with customers by meeting customer needs, resolving concerns or issues.
- Referring customers with more detailed enquires (e.g. home or personal loans).
- Ensuring cash holding is balanced daily.
- Administering all aspects of branch ATMs e.g. ordering cash, loading and balancing.
- Ensuring that all relevant procedures and guidelines are adhered to.
- Performing general administrative duties within the branch on a routine and as required basis. E.g. monitoring coin reverse, filing daily vouchers, foreign cash/travellers cheque transactions.

Key skills

- Customer service focus.
- Product knowledge/Technical knowledge of banking systems.
- Communication and interpersonal skills.

Internal contacts

Head office support staff.

External contacts

Customers.

Typical experience

At least 2 years of experience in all aspects of branch transactions as well as the ability to present and promote the organisation's product line.

Other comments

Position Description

Position title:	**Customer Service Consultant**
Position code:	**FINCNB.BD.CSMF.1**
Level:	**1**

Responsible for

Providing in branch customer service across a range of queries

Report to

Branch Manager or Team Leader - Retail Banking

Supervises

No supervisory responsibilities.

Main activities

- Providing an efficient service to customers by prompt and accurate processing of transactions.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer’s needs.
- Maintaining a high standard of customer service and personal presentation.
- Building long term relationships with customers by meeting customer needs, resolving concerns or issues.
- Referring customers with more detailed enquires (e.g. home or personal loans).
- Ensuring cash holding is balanced daily.
- Administering all aspects of branch ATMs e.g. ordering cash, loading and balancing.
- Ensuring that all relevant procedures and guidelines are adhered to.
- Performing general administrative duties within the branch on a routine and as required basis. E.g. monitoring coin reverse, filing daily vouchers, foreign cash/travellers cheque transactions.

Key skills

- Customer service focus.
- Product knowledge/Technical knowledge of banking systems.
- Communication and interpersonal skills.

Internal contacts

Head office support staff.

External contacts

Customers.

Typical experience

At least 1 year of experience in all aspects of branch transactions as well as the ability to present and promote the organisation's product line.

Other comments

Position Description

Position title:	**Branch Sales - Combined - Level 5**
Position code:	**FINCNB.BD.BS00.5**
Level:	**5**

Responsible for

Managing the activities of an small branch (<6 staff) to achieve branch profit and other targets (objectives).

Report to

Regional Manager

Supervises

Retail Banking staff

Main activities

- Ensuring emphasis on efficient customer service at all time resulting in prompt, courteous and efficient processing of all transactions.
- Ensuring the quality of lending, credit management and control of bad debts within the Branch is maintained to required standards.
- Approving loans within authority/discretionary limits and referring larger amounts through relevant channels for approval.
- Maintaining and developing the personal skills of all staff in the branch to maximise target achievement. This role will include recruitment, training and development, reward and performance assessment.
- Being accountable for the maintenance of the organisation's policies and procedures within prescribed limits of approval for the branch.
- Submitting all required reports concerning branch operations promptly and accurately.
- Ensuring all branch and customer records and assets are safeguarded. Continually monitoring and improving office processing, procedures and documentation.
- Actively promoting the organisation's product range and developing the business activities of the branch through continual customer contact.

Key skills

- Effective management skills.
- Excellent knowledge of Branch operations.
- Excellent communication skills.

Internal contacts

Head Office Support staff.

External contacts

Major customers, developers, insurers, Government and local authority departments, other financial institutions.

Typical experience

5-7+ years experience in all branch operations.

Other comments

Position Description

Position title:	**Branch Sales - Combined - Level 4**
Position code:	**FINCNB.BD.BS00.4**
Level:	**4**

Responsible for

Acting as a advisor to sell complex products (such as home loans or higher levels of credit) to best suit the customer needs. Identifying potential customer leads.

Report to

Branch Manager

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Providing customers with a tailored service around an organisation's complex product offering.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer’s needs.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Actively building relationships around the business that support branch initiatives.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Customer service focus.
- In-depth complex Product knowledge/Technical knowledge of banking systems.
- Communication and interpersonal skills.

Internal contacts

Head Office Support staff.

External contacts

Customers.

Typical experience

At least 4-5 years of experience in all aspects of branch transactions as well as the ability to present and promote the organisation's complex product line.
AFA Qualified.

Other comments

Position Description

Position title:	**Branch Sales - Combined - Level 3**
Position code:	**FINCNB.BD.BS00.3**
Level:	**3**

Responsible for

Acting as a advisor to sell products (such as personal loans and credit card lending) to best suit the customer needs.
Identifying potential customer leads.

Report to

Branch Manager

Supervises

No supervisory responsibilities.

Main activities

- Providing customers with a tailored service around an organisation's complex product offering.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer's needs.
- Maintaining a high standard of customer service and personal presentation.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Actively build relationships around the business that support branch initiatives.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Customer service focus.
- In-depth complex Product knowledge/Technical knowledge of banking systems.
- Communication and interpersonal skills.

Internal contacts

Head Office Support staff.

External contacts

Customers.

Typical experience

At least 2-3 years of experience in all aspects of branch transactions as well as the ability to present and promote the organisation's product line.
AFA Qualified.

Other comments

Position Description

Position title:	**Manager Mobile Lending**
Position code:	**FINCNB.SA.DSCL.5**
Level:	**5**

Responsible for

Ensuring cost effective business growth through superior distribution, quality service and the effective management of Mobile Lending Sales Teams, servicing clients within a geographic area. Products and services include home loans and lines of credit.

Report to

Regional Manager

Supervises

Mobile Lending team

Main activities

- Achieving business growth and performance targets to assist in the attainment of regional sales plans.
- Identifying opportunities and developing strategies to optimise income and effective manage costs.
- Conducting team meetings to disseminate results, analyse effectiveness of sales efforts, assist staff in developing sales strategies and identify product or skills training needs.
- Providing for and actively managing staff development and succession planning.
- Approving lending proposals within delegation parameters.
- Controlling and monitoring the quality of the lending portfolio and ensuring the timely identification and management of potentially risky loans.
- Performing lending analysis and control including actioning pricing issues.
- Monitoring the team's adherence to customer service standards which includes monitoring and actioning customer complaints.
- Monitoring and coaching staff to ensure compliance with relevant policies and procedures, laws and codes of practice.

Key skills

- Knowledge of local markets combined with an understanding of local product requirements.
- Ability to mentor and coach Sales Representatives and Lending Specialists.
- Broad knowledge of lending products (including business lending products), policies and procedures.

Internal contacts

Area Manager Sales, Mobile Lenders, Lenders and Lending Support Staff.

External contacts

Solicitors, Accountants, Receivers, Valuation Specialists, Customers.

Typical experience

At least 7+ years relevant industry experience including sales leadership. AFA qualification.

Other comments

Position Description

Position title:	**Senior Mobile Lender**
Position code:	**FINCNB.SA.DSCL.4**
Level:	**4**

Responsible for

The sale of financial products to new and existing customers by visiting them at their home, office or service outlet.

Report to

Regional Manager or Manager - Mobile Lending

Supervises

No Supervisory Responsibilities.

Main activities

- Selling a range of financial products and services to both new and existing clients.
- Forwarding applications and information to the Sales Support Centre for processing.
- Handing over newly acquired clients to the appropriate client services.
- Building and maintaining a network of referral sources.
- Ensuring compliance with relevant policies and procedures, laws and codes of practice.

Key skills

- Well developed sales skills, supported by excellent product and services knowledge.
- Excellent communication skills.
- Self motivated as well as being highly organised.

Internal contacts

Sales Administration Team, Sales Advisers.

External contacts

Customers.

Typical experience

At least 4-5 years sales experience in a financial services environment. AFA qualification.

Other comments

Position Description

Position title:	**Mobile Lender**
Position code:	**FINCNB.SA.DSCL.3**
Level:	**3**

Responsible for

Selling financial products to new and existing customers by visiting them at their home, office or service outlet.

Report to

Regional Manager or Manager - Mobile Lending.

Supervises

No supervisory responsibilities.

Main activities

- Selling a range of financial products and services to both new and existing clients.
- Forwarding applications and information to the Sales Support Centre for processing.
- Handing over newly acquired clients to the appropriate client services.
- Building and maintaining a network of referral sources.
- Ensuring compliance with relevant policies and procedures, laws and codes of practice.

Key skills

- Well developed sales skills, supported by excellent product and services knowledge.
- Excellent communication skills.
- Self motivated as well as being highly organised.

Internal contacts

Sales Administration Team, Sales Advisers.

External contacts

Customers.

Typical experience

3-5+ years sales experience in a financial services environment. AFA qualification.

Other comments

Position Description

Position title:	**Manager Mortgage Broking**
Position code:	**FINCNB.SA.DSMB.5**
Level:	**5**

Responsible for

Ensuring cost effective business growth through superior distribution, quality service and the effective management of Brokerage Teams, servicing clients within a geographic area. Products and services include home loans and lines of credit.

Report to

Brokerage Owner or General Manager

Supervises

Brokerage Team

Main activities

- Managing Broking Team to achieve business growth and performance targets to assist in the attainment of company sales plans.
- Identifying opportunities and developing strategies to optimise income and effective manage costs.
- Liaising with financial services institutions to obtain required product/credit streams.
- Conducting team meetings to disseminate results, analyse effectiveness of sales efforts, assist staff in developing sales strategies and identify product or skills training needs.
- Providing for and actively managing staff development and succession planning.
- Monitoring lending proposals to ensure legal and regulatory compliance.
- Monitoring the quality of the lending submissions and ensuring the timely identification and reporting of potentially risky loans.
- Monitoring the team's adherence to customer service standards which includes monitoring and actioning customer complaints.
- Monitoring and coaching staff to ensure compliance with company policies and procedures, laws and codes of practice.

Key skills

- Knowledge of local markets combined with an understanding of local product requirements.
- Ability to develop good relationships with financial institutions.
- Broad knowledge of lending products (including business lending products), policies and procedures.

Internal contacts

Brokers and Senior Brokers. Administration Team.

External contacts

Customers, financial institutions

Typical experience

At least 7+ years relevant industry experience including sales leadership. AFA qualification.

Other comments

Position Description

Position title:	**Senior Mortgage Broker**
Position code:	**FINCNB.SA.DSMB.4**
Level:	**4**

Responsible for

The sale of financial products to new and existing customers by visiting them at their home, office or service outlet.

Report to

Brokerage Manager

Supervises

No supervisory responsibilities.

Main activities

- Selling a range of financial products and services to both new and existing clients.
- Forwarding applications and information to relevant financial institutions for processing.
- Building and maintaining a network of referral sources.
- Ensuring compliance with relevant policies and procedures, laws and codes of practice.

Key skills

- Well developed sales skills, supported by excellent product and services knowledge.
- Excellent communication skills.
- Self motivated as well as being highly organised.

Internal contacts

Senior Brokers and Brokers.
Administration Team.

External contacts

Customers, financial institutions

Typical experience

At least 4-5 years sales experience in a financial services environment. AFA qualification.

Other comments

Position Description

Position title:	**Mortgage Broker**
Position code:	**FINCNB.SA.DSMB.3**
Level:	**3**

Responsible for

Selling financial products to new and existing customers by visiting them at their home, office or service outlet.

Report to

Brokerage Manager

Supervises

No supervisory responsibilities.

Main activities

- Selling a range of financial products and services to both new and existing clients.
- Forwarding applications and information to relevant financial institutions for processing.
- Building and maintaining a network of referral sources.
- Ensuring compliance with relevant policies and procedures, laws and codes of practice.

Key skills

- Well developed sales skills, supported by excellent product and services knowledge.
- Excellent communication skills.
- Self motivated as well as being highly organised.

Internal contacts

Senior Brokers and Brokers.
Administration Team.

External contacts

Customers, financial institutions

Typical experience

3-5+ years sales experience in a financial services environment. AFA qualification.

Other comments

Position Description

Position title:	**Regional Manager Private Banking**
Position code:	**FINCNB.SA.DSPB.5**
Level:	**5**

Responsible for

Overseeing the team to provide a comprehensive range of personal banking services to high net worth clients

Report to

General Manager/Head of Retail Banking

Supervises

Private Banking Team

Main activities

- Providing input to senior management on sales strategy, policies and objectives as well as sales and business development targets for the Private Banking network.
- Developing and managing the network of Managers and Advisors by identifying, recruiting and training staff, and managing their performance.
- Developing business and product plans, setting sales and business development targets, monitoring and reporting on performance to senior management.
- Ensuring accurate reporting systems for management information.
- Ensuring up-to-date systems, marketing, product and technical training for Financial Advisors, including risk management and legal/compliance issues, by liaising with appropriate internal support services. Managing and reporting on the performance against targets of the division and individual staff members.

Key skills

- Strong leadership, negotiating, interpersonal and people-management skills.
- Extensive experience in servicing clients in Private Banking environment.
- Demonstrated strategic thinking and business development skills.

Internal contacts

Private banking staff at all levels, Marketing, Technical, Product Development, Investment & Risk Management

External contacts

Individual clients, investment companies, industry associations

Typical experience

At least 7-10+ years of experience in all aspects of branch transactions as well as an extensive knowledge of the organisation's complex product line. Relevant degree and AFA qualification.

Other comments

Position Description

Position title:	**Senior Client Manager**
Position code:	**FINCNB.SA.DSPB.4**
Level:	**4**

Responsible for

Managing a portfolio of Private Banking clients, providing a comprehensive range of personal banking services, either personally or by directing the work of Team Members.

Report to

Regional Manager - Private Banking

Supervises

May supervise Client Managers and/or Personal Bankers

Main activities

- Providing customers with a tailored service around an organisation's complex product offering by acting personally for high-net-worth clients, or supervising the delivery of services to customers through a team of Client Managers.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer’s needs.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Actively build relationships around the business that support the organisation's initiatives.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Excellent knowledge of all products, provides advice & ongoing support of transactions. High level systems & product accounting skills. Knowledge of regulatory & tax requirements. Applies excellent communication & management skill, along with product knowledge. Good knowledge of reporting tools & technologies.

Internal contacts

Investment and Financial Planning staff, Marketing, Technical, Product Development staff

External contacts

Individual clients, investment companies, industry associations

Typical experience

At least 5-7 years of relevant experience in all aspects of branch transactions and wealth/funds management as well as the ability to present and promote the organisation's complex product line. Relevant degree and AFA qualification.

Other comments

Position Description

Position title:	**Client Manager**
Position code:	**FINCNB.SA.DSPB.3**
Level:	**3**

Responsible for

Managing personally an assigned portfolio of Private Banking clients, providing a comprehensive range of personal banking services

Report to

Regional Manager - Private Banking

Supervises

May supervise Personal Bankers.

Main activities

- Providing customers with a tailored service for the day-to-day management of their accounts.
- Identifying and capitalising on sales opportunities by explaining the features and benefits of the organisation's product range and cross selling to the customer’s needs.
- Building long term relationships with customers by exceeding customer needs and resolving concerns or issues.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Excellent knowledge of all products, provides advice & ongoing support of transactions. High level systems & product accounting skills. Knowledge of regulatory & tax requirements. Applies excellent communication & management skill, along with product knowledge. Good knowledge of reporting tools & technologies.

Internal contacts

Investment and Financial Planning staff, Marketing, Technical, Product Development staff

External contacts

Individual clients, investment companies, industry associations

Typical experience

5+ years experience, including at least 2-3 years experience in wealth & funds management. Degree, AFA qualification.

Other comments

Position Description

Position title:	**Manager - Lending Operations**
Position code:	**FINCNB.CO.CBLP.5**
Level:	**5**

Responsible for

Managing the team and overseeing the loan application process within a designated area. Presenting or approving terms and ensuring ongoing loans management and control.

Report to

General Manager/ Head of Retail, or Business & Corporate Banking or Head of Operations

Supervises

Supervisors - Loans, support staff.

Main activities

- Managing the Lending Operations Team and overseeing the Lending Operations office.
- Monitoring all loan/credit applications in a selected region or area.
- Establishing customer contact.
- Investigating loan viability and securities, approving and rejecting applications (within limits of authority), arranging loan contracts and ensuring ongoing account maintenance.
- Obtaining a high level of customer service through staff performance, efficiency & productivity levels.
- Submitting for approval credit facilities outside individual authority levels.
- Monitoring existing loan procedures & advising on and, where appropriate, implementing changes to improve efficiency.
- Maintaining close contact with all major commercial institutions in the region and may promote the organisation's product range - creating & maintaining a network of loan referral contacts.
- Ensuring all commercial loan policies and procedures are strictly adhered to and being responsible for the quality and quantity of all lending paper and achievement of budgets.
- Maintaining close contact with all branch operations in the region/area.
- Achieving all ancillary product sales i.e. investments, visa and insurance.

Key skills

- Strong people management skills.
- Strong knowledge of financial and market tools.
- Good operational management skills and a record of successful implementation management.
- Good communication skills.

Internal contacts

Operations staff, Sales and Marketing staff, Finance and Administration staff.

External contacts

All major clients, commercial loan applicants, credit referees, other financial institutions, credit reference bureaus.

Typical experience

At least 7 years lending experience, most often in a branch environment.

Other comments

Position Description

Position title:	**Team Leader - Lending Operations**
Position code:	**FINCNB.CO.CBLP.4**
Level:	**4**

Responsible for

Controlling and supervising the day to day activities of Lending Operations staff involved with the assessment, approval and processing of lease, credit and loan applications.

Report to

Manager - Lending Operations

Supervises

Team of support staff.

Main activities

- Organising and supervising the day to day activities of Lending Operations staff, ensuring that they adhere to policy and procedural guidelines.
- Analysing out of the ordinary loan applications referred by officers in terms of their suitability and inherent credit risks, referring decisions as required to more senior management.
- Providing training and development opportunities for staff and offering regular feedback through performance appraisal.
- Recommending loan approvals or rejections as appropriate within authority levels.
- Maintaining an efficient administration and reporting system, providing management information to superiors.
- Implementing changes to policies and procedures laid down by management.

Key skills

- Possesses strong knowledge of policies and procedures that affect the lending environment.
- Leadership and motivational skills.
- Good communication skills.

Internal contacts

Operational staff, Finance and Administration staff.

External contacts

Solicitors, Real Estate Agents, Credit Reference Bureaus and Borrowers

Typical experience

4-5+ years experience in all aspects related to lending.

Other comments

Position Description

Position title:	**Senior Lending Officer - Lending Operations**
Position code:	**FINCNB.CO.CBLP.3**
Level:	**3**

Responsible for
Controlling and supervising the day to day activities of Lending Operations staff involved with the assessment, approval and processing of lease, credit and loan applications.

Report to
Manager - Lending Operations

Supervises
Team of support staff.

Main activities
- Organising and supervising the day to day activities of Lending Operations staff, ensuring that they adhere to policy and procedural guidelines.
- Analysing out of the ordinary loan applications referred by officers in terms of their suitability and inherent credit risks, referring decisions as required to more senior management.
- Providing training and development opportunities for staff and offering regular feedback through performance appraisal.
- Recommending loan approvals or rejections as appropriate within authority levels.
- Maintaining an efficient administration and reporting system, providing management information to superiors.
- Implementing changes to policies and procedures laid down by management.

Key skills
- Possesses strong knowledge of policies and procedures that affect the lending environment.
- Leadership and motivational skills.
- Good communication skills.

Internal contacts
Operational staff, Finance and Administration staff.

External contacts
Solicitors, Real Estate Agents, Credit Reference Bureaus and Borrowers.

Typical experience
4-5+ years experience in all aspects related to lending.

Other comments

Position Description

Position title:	**Lending Officer**
Position code:	**FINCNB.CO.CBLP.2**
Level:	**2**

Responsible for

Assessing, approving and processing lease, credit and loan applications. Analysing their viability and credit risk within policy standards and company guidelines.

Report to

Team Leader - Lending Operations

Supervises

No supervisory responsibilities.

Main activities

- Analysing loan applications in terms of their suitability and inherent credit risks, checking all available references and nominated securities and credit scoring.
- Recommending loan approvals or rejections as appropriate within authority levels.
- Monitoring the performance of allocated accounts to ensure that bad debts are kept to a minimum.
- Maintaining an efficient administration and reporting system.
- Ancillary product sales, i.e. investments and insurance, etc.
- Creating and maintaining a network of external loan referable contacts.
- Advising management on aspects of loans applications.

Key skills

- Sound judgment in delivering credit risks.
- Good adherence to policy guidelines.
- Good administrative and procedural knowledge.

Internal contacts

Operational staff, Finance and Administration staff, Legal Advisers.

External contacts

Solicitors, Real Estate Agents, Credit Reference Bureaus and Borrowers.

Typical experience

12 - 18+ months in a lending/loans environment.

Other comments

Position Description

Position title:	**Manager - Processing & Transaction Support**
Position code:	**FINCNB.CO.CBMF.5**
Level:	**5**

Responsible for

Ensuring the successful execution of operational processes in line with business objectives and the desired customer experience. Driving the successful execution of processes internally and/or by partners who may be internal or external, onshore or offshore.

Report to

General Manager/Head of Operations Support/ Transaction Services.

Supervises

May supervise Team Leaders or Operations staff.

Main activities

- Managing key operational processes and understanding the end-to-end processes, stakeholders and desired customer experience.
- Managing the key process drivers and taking action to reduce costs, improve quality and improve customer service.
- Engaging with all parties involved in the operational aspects of processes to deliver agreed customer experience, KPI's and unit costs.
- Understanding current and potential bottle necks/breakage points and taking action to eliminate and improve quality and timeliness of output.
- Managing and escalating processing errors, consistent with corporate policy.
- Providing direction on changes to processes resulting from new business initiatives or regulatory or compliance changes. Engaging all parties to ensure changes are successfully implemented.
- Ensuring the business unit and on/offshore vendors adhere to policies and procedures, regulatory and legislative requirements. Ensuring that complete and accurate documentation is maintained at all times.
- Reporting operational metrics and business drivers.

Key skills

- Strong communication skills.
- Ability to build collaborative relationships with all stakeholders.
- Ability to identify, understand and analyse issues and choose a course of action or develop an appropriate solution.
- Demonstrated ability to understand the business and customers.
- Understanding of operations processes and their relationship across the organisation both onshore and offshore.

Internal contacts

Business units involved in the operational aspects of processes.

External contacts

On and/or offshore internal and external customers.

Typical experience

7 - 10+ years experience in process and vendor management across multiple sites, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Team Leader - Processing & Transaction Support**
Position code:	**FINCNB.CO.CBMF.4**
Level:	**4**

Responsible for

Managing diverse processes and ensuring adequate staffing for former back office ledger functions in the Branch Network (account maintenance and verification, deceased estates, periodical payments, list pays and reports).

Report to

Manager - Operations, Transactions, or Managers in Administration, Payroll, Accounts, Finance, Logistics, Purchasing, Human Resources or Branches.

Supervises

A team of customer service staff.

Main activities

- Ensuring all appropriate responses to customer requests are provided within specified time-frames and service levels.
- Monitoring service levels for account process functions, report completion and resolution of customer complaints
- Maximising staff performance levels and job satisfaction to achieve and maintain agreed target levels for turnover and morale.
- Planning and implementing change initiatives and monitoring results to maximise benefits.
- Ensuring that policies and procedures comply with company policy and legislation, including rectification of deficiencies and resolution of any issue(s).
- Developing and implementing process improvements to achieve customer service level enhancements.

Key skills

- High conceptual/analytical ability, coaching skills, ability to plan and organise.

Internal contacts

Branch Managerial/Supervisory staff.

External contacts

Customers, Clients and Suppliers.

Typical experience

4-5+ years experience in customer service/banking.

Other comments

Position Description

Position title:	**Senior Processing & Transaction Support Officer**
Position code:	**FINCNB.CO.CBMF.3**
Level:	**3**

Responsible for

Providing transactional support for the organisation and internal Departments/Teams.

Report to

Team Leaders/ Managers

Supervises

No supervisory responsibilities.

Main activities

- Handling complete segments of a Branch or Department's transactional work without supervision.
- Maintaining all processing as required.
- Drafting of correspondence as required.
- Collating reports and statistical information within area of assigned activity.
- Resolving discrepancies and handling difficult exceptions, recognising problem areas as they arise and making recommendations to group leader for action.
- Recommending and actioning changes for procedures and policies.

Key skills

- Good interpersonal and communication skills.
- Intermediate MS Office skills.
- Strong organisation and time management skills.
- Ability to work in a team environment.

Internal contacts

Staff at all Levels.

External contacts

Customers, Clients and Suppliers.

Typical experience

At least 2 - 4 years applicable experience in a specific functional area. High school qualifications or equivalent with course work in business curriculum.

Other comments

Position Description

Position title:	**Processing & Transaction Support Officer**
Position code:	**FINCNB.CO.CBMF.2**
Level:	**2**

Responsible for

Providing transactional support for the organisation and internal Departments/Teams.

Report to

Team Leaders/ Managers

Supervises

No supervisory responsibilities.

Main activities

- Handling segments of a Branch or Department's transactional work without supervision.
- Maintaining all processing as required.
- Drafting of correspondence as required.
- Collating reports within area of assigned activity.
- Resolving discrepancies and handling exceptions, recognising problem areas as they arise.

Key skills

- Good interpersonal and communication skills.
- Intermediate MS Office skills.
- Effective organisation and time management skills.
- Efficient and accurate typing ability.
- Ability to work in a team environment.

Internal contacts

Staff at all Levels

External contacts

Customers, Clients and Suppliers.

Typical experience

At least 12-18 months applicable work experience. High school qualifications or equivalent with course work in business curriculum.

Other comments

Position Description

Position title:	**Manager - Loss Recovery Operations**
Position code:	**FINCNB.CS.COMF.5**
Level:	**5**

Responsible for

Ensuring the protection of the company's investments by minimising losses, efficiently managing the receivables portfolio and improving recoveries.

Report to

General Manager/ Head of Operations Support/Transaction Services

Supervises

Collections and Loans officers, Credit Control analysts.

Main activities

- Producing accurate and timely reports to monitor accounts and identify delinquency trends, recommending corrective action.
- Supervising collection staff and establishing correction strategies to ensure efficient processing of accounts and thereby collection of delinquent amounts.
- Liaising with Consumer Affairs department, Police and Bankruptcy agencies on fraud and utilising collection agencies and solicitors as required.
- Establishing goals for delinquency/loss/bad debt numbers and performance required from section to maintain a high credit quality in the receivables book.
- Ensuring that systems documentation and procedures comply with legal/legislative requirements so as to avoid adverse litigation and loss of income.
- Assisting in the training and development of operational staff to maintain and improve the efficiency of credit control.
- Improving the efficiency of the credit process and systems continually.
- Accrediting vendors that introduce new business.

Key skills

- Strong administration skills.
- Excellent people management skills.
- Good communication skills.
- Good data processing skills.
- Proactive approach to business activity and process improvement.

Internal contacts

Legal Department, Operational staff, Finance and Administration staff, Business Development staff.

External contacts

Collection agencies, Credit reference bureaus, Credit referees, other financial institutions.

Typical experience

An extensive knowledge and understanding of credit control operations, policy and procedures in recovery. At least 7+ years relevant experience in a financial services environment

Other comments

Position Description

Position title:	**Team Leader - Loss Recovery Operations**
Position code:	**FINCNB.CS.COMF.4**
Level:	**4**

Responsible for

Supervising and training staff in their role of collecting arrears and accounts thereby minimising delinquencies and resultant bad debts.

Report to

Manager - Loss Recovery Operations

Supervises

Credit Control officers

Main activities

- Arranging for the collection of delinquent amounts through the efficient supervision and guidance of staff.
- Ensuring speedy and effective recovery of amounts outstanding often dealing with repossession agents by personal and telephone contact.
- Ensuring that correct company procedures and guidelines are followed - acting as a checking officer.
- Continual training of staff in the workplace.
- Ensuring that correct accounts are credited by batching and checking individual entries.
- Trying to resolve difficult cases by liaising with Financial counsellors, Solicitors and other legal bodies.

Key skills

- Supervisory skills.
- Very good procedural knowledge.

Internal contacts

Lending Officers/staff, Operational staff.

External contacts

Difficult customers, solicitors, accountants, financial counsellors, repossession agents.

Typical experience

4 - 5+ years experience in collection of amounts outstanding.

Other comments

Position Description

Position title:	**Senior Loss Recovery Officer**
Position code:	**FINCNB.CS.COMF.3**
Level:	**3**

Responsible for

Commencing or continuing specialised collection action on written off amounts or accounts in arrears in order to maximise recovery of bad debt.

Report to

Team Leader - Loss Recovery

Supervises

May supervise more junior Recovery Officers.

Main activities

- Making contact with debtors and negotiating a mutually agreed arrangement for payment of arrears and finalising arrangements for repayment of debts.
- Preparing court processes, documentation and correspondence with debtors and their counsel.
- Continually updating knowledge about clients' financial affairs by analysing and evaluating information from various financial organisations.
- Conducting inquiries/searches to locate missing debtors.
- Ensuring that policy and procedures are adhered to in relation to timeframes, reconciling accounts, adjustments, charging penalty interest and fees and issuance of relevant default and property enforcement notices.

Key skills

- Advanced communication skills.
- Advanced negotiation skills.
- Ability to build relationships with a diverse range of people.
- Knowledge of legal requirements.

Internal contacts

Finance and Administration staff, Legal specialists.

External contacts

Debtors or their representatives, Solicitors and Trustees.

Typical experience

3+ years experience in a loss recovery environment.

Other comments

Position Description

Position title:	**Loss Recovery Officer**
Position code:	**FINCNB.CS.COMF.2**
Level:	**2**

Responsible for

Under supervision, commencing or continuing specialised collection action on written off amounts or accounts in arrears in order to maximise recovery of bad debt.

Report to

Team Leader - Loss Recovery

Supervises

No supervisory responsibilities.

Main activities

- Making contact with an allocated portfolio of debtors and negotiating, within pre-determined parameters, a mutually agreed arrangement for payment of arrears and finalising arrangements for repayment of debts.
- Preparing court processes, documentation and correspondence with debtors and their counsel, and submitting them for sign-off.
- Continually updating knowledge about clients' financial affairs by analysing and evaluating information from various financial organisations.
- Conducting inquiries/searches to locate missing debtors as directed.
- Ensuring that policy and procedures are adhered to in relation to timeframes, reconciling accounts, adjustments, charging penalty interest and fees and issuance of relevant default and property enforcement notices.

Key skills

- Good communication skills.
- Advanced negotiation skills.
- Ability to build relationships with a diverse range of people.
- Knowledge of legal requirements.

Internal contacts

Finance and Administration staff, Legal specialists.

External contacts

Debtors or their representatives, Solicitors and Trustees.

Typical experience

12 - 18+ months experience in collection with a good working knowledge of legislative requirements and the court process.

Other comments

Position Description

Position title:	**Consumer Banking Operations - Combined - Level 5**
Position code:	**FINCNB.CO.CB00.5**
Level:	**5**

Responsible for

Ensuring the successful execution of operational processes in line with business objectives and the desired customer experience. Driving the successful execution of processes internally and/or by partners who may be internal or external, onshore or offshore.

Report to

General Manager/Head of Operations Support/ Transaction Services.

Supervises

May supervise Team Leaders or Operations staff.

Main activities

- Managing key operational processes and understanding the end-to-end processes, stakeholders and desired customer experience.
- Managing the key process drivers and taking action to reduce costs, improve quality and improve customer service.
- Engaging with all parties involved in the operational aspects of processes to deliver agreed customer experience, KPI's and unit costs.
- Understanding current and potential bottle necks/breakage points and taking action to eliminate and improve quality and timeliness of output.
- Managing and escalating processing errors, consistent with corporate policy.
- Providing direction on changes to processes resulting from new business initiatives or regulatory or compliance changes. Engaging all parties to ensure changes are successfully implemented.
- Ensuring the business unit and on/offshore vendors adhere to policies and procedures, regulatory and legislative requirements. Ensuring that complete and accurate documentation is maintained at all times.
- Reporting operational metrics and business drivers.

Key skills

- Strong communication skills.
- Ability to build collaborative relationships with all stakeholders.
- Ability to identify, understand and analyse issues and choose a course of action or develop an appropriate solution.
- Demonstrated ability to understand the business and customers.
- Understanding of operations processes and their relationship across the organisation both onshore and offshore.

Internal contacts

Business units involved in the operational aspects of processes.

External contacts

On and/or offshore internal and external customers.

Typical experience

7 - 10+ years experience in process and vendor management across multiple sites, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Consumer Banking Operations - Combined - Level 4**
Position code:	**FINCNB.CO.CB00.4**
Level:	**4**

Responsible for

Managing diverse processes and ensuring adequate staffing for former back office ledger functions in the Branch Network (account maintenance and verification, deceased estates, periodical payments, list pays and reports).

Report to

Manager - Operations, Transactions, or Managers in Administration, Payroll, Accounts, Finance, Logistics, Purchasing, Human Resources or Branches.

Supervises

A team of customer service staff.

Main activities

- Ensuring all appropriate responses to customer requests are provided within specified time-frames and service levels.
- Monitoring service levels for account process functions, report completion and resolution of customer complaints
- Maximising staff performance levels and job satisfaction to achieve and maintain agreed target levels for turnover and morale.
- Planning and implementing change initiatives and monitoring results to maximise benefits.
- Ensuring that policies and procedures comply with company policy and legislation, including rectification of deficiencies and resolution of any issue(s).
- Developing and implementing process improvements to achieve customer service level enhancements.

Key skills

- High conceptual/analytical ability, coaching skills, ability to plan and organise.

Internal contacts

Branch Managerial/Supervisory staff.

External contacts

Customers, Clients and Suppliers.

Typical experience

4-5+ years experience in customer service/banking.

Other comments

Position Description

Position title:	**Consumer Banking Operations - Combined - Level 3**
Position code:	**FINCNB.CO.CB00.3**
Level:	**3**

Responsible for

Providing transactional support for the organisation and internal Departments/Teams.

Report to

Team Leaders/ Managers

Supervises

No supervisory responsibilities.

Main activities

- Handling complete segments of a Branch or Department's transactional work without supervision.
- Maintaining all processing as required.
- Drafting of correspondence as required.
- Collating reports and statistical information within area of assigned activity.
- Resolving discrepancies and handling difficult exceptions, recognising problem areas as they arise and making recommendations to group leader for action.
- Recommending and actioning changes for procedures and policies.

Key skills

- Good interpersonal and communication skills.
- Intermediate MS Office skills.
- Strong organisation and time management skills.
- Ability to work in a team environment.

Internal contacts

Staff at all Levels.

External contacts

Customers, Clients and Suppliers.

Typical experience

At least 2 - 4 years applicable experience in a specific functional area. High school qualifications or equivalent with course work in business curriculum.

Other comments

Position Description

Position title:	**Consumer Banking Operations - Combined - Level 2**
Position code:	**FINCNB.CO.CB00.2**
Level:	**2**

Responsible for

Providing transactional support for the organisation and internal Departments/Teams.

Report to

Team Leaders/ Managers

Supervises

No supervisory responsibilities.

Main activities

- Handling segments of a Branch or Department's transactional work without supervision.
- Maintaining all processing as required.
- Drafting of correspondence as required.
- Collating reports within area of assigned activity.
- Resolving discrepancies and handling exceptions, recognising problem areas as they arise.

Key skills

- Good interpersonal and communication skills.
- Intermediate MS Office skills.
- Effective organisation and time management skills.
- Efficient and accurate typing ability.
- Ability to work in a team environment.

Internal contacts

Staff at all Levels

External contacts

Customers, Clients and Suppliers.

Typical experience

At least 12-18 months applicable work experience. High school qualifications or equivalent with course work in business curriculum.

Other comments

Position Description

Position title:	**Scheme Administration Manager / Operations Manager**
Position code:	**FINASM.AO.RPPG.5**
Level:	**5**

Responsible for

Managing the Superannuation and/or KiwiSaver scheme administration team.

Report to

Business Manager.

Supervises

Scheme Administration Team Leaders.

Main activities

- Managing 8-10 staff who are responsible for the administration of superannuation or KiwiSaver plans.
- Setting and monitoring work standards within the team. ¨
- Part of the Superannuation / KiwiSaver management team which monitors the progress of the team as a whole. ¨
- Dealing with staff management issues: development and delivery, organisation of appropriate training programs; motivation and morale; employee counselling and guidance; direction and assessment including annual performance reviews; recruitment; control supervision.
- Analysing legislation and regulatory issues as they emerge, and ascertaining the administrative impact on clients.
- Dealing with other client service and administration issues: superannuation vesting, legislation, etc.; classification systems, inputting benefits, lump sum tax, etc.

Key skills

- Commercial awareness of the superannuation industry.
- Proven leadership qualities.

Internal contacts

Management, Superannuation department.

External contacts

Clients, Advisers, Industry Bodies and Associations.

Typical experience

At least 2 years background in Superannuation / KiwiSaver Administration. Diploma in Superannuation Management is strongly preferred.

Other comments

Position Description

Position title:	**Scheme Administration Team Leader**
Position code:	**FINASM.AO.RPPG.4**
Level:	**4**

Responsible for

Providing a high quality client service for Trustees, participating employers and members of schemes under managed administration. Managing a team of Administrators to ensure the efficient achievement of Performance Standards and meet agreed objectives.

Report to

Scheme Administration Manager / Operations Manager

Supervises

Administration Team.

Main activities

- Managing a single administration team.
- Organising, monitoring and controlling work flow of the team.
- Liaising with consultants in setting priority work and agreeing targets.
- Working with Scheme Administration Manager to aid in technical and personal development of team members.
- Being available as a point of reference for individual team members for technical advice and guidance.
- Providing a high level of service to all clients, both internally and externally.
- Implementing change where appropriate in relation to legislative or procedural change.

Key skills

- Ability to train, motivate and provide feedback to staff.
- Above average written, oral and analytical skills.

Internal contacts

Management, Superannuation department.

External contacts

Clients, Advisers, Industry Bodies and Associations.

Typical experience

At least 12 months background in administration of large funds to develop technical requirements. Certificate of Superannuation Management, and study towards Diploma favoured strongly.

Other comments

Position Description

Position title:	**Senior Scheme Administrator**
Position code:	**FINASM.AO.RPPG.3**
Level:	**3**

Responsible for

Administrating and liaising closely with a number of schemes with some large, complex or difficult funds. (As a guide to the size of the job, the incumbent would be responsible for approximate 10 plans with an average of 100-300 per plan.)

Report to

Scheme Administration Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Servicing and administering existing accounts and coordinating renewals.
- Completing and checking day-to-day administration matters, usually of a complex nature.
- Processing and checking annual review of all types of funds.
- Attending to benefits design changes.
- Authorising journal entries and cheque requisitions for small amounts.
- Overseeing the submission and implementation of new entrants for employers.
- Attending to telephone and written client inquiries relating to plans, including researching complex client queries and presenting results to clients.
- Assisting management in the development and attainment of new business.
- Assisting in running section by training and assisting new staff.
- May assist Supervisor with performance appraisal process.

Key skills

- Ability to work independently, prioritise and multi-task.
- Excellent interpersonal, written and oral communication skills.
- Ability to deal with clients at all levels and solve complex issues.
- Ability to train, develop and mentor Team Members.

Internal contacts

Management, Superannuation department.

External contacts

Clients, Advisers, Industry Bodies and Associations.

Typical experience

At least 5 years experience in Superannuation / KiwiSaver Administration, together with relevant qualifications in Superannuation Management.

Other comments

Position Description

Position title:	**Scheme Administrator level 3**
Position code:	**FINASM.AO.RPPG.2**
Level:	**2**

Responsible for

Administrating a number of schemes or employer groups within a fund.

Report to

Scheme Administration Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Processing and checking new entrants for employers and benefit payments of a more complex nature.
- Performing complex reconciliation of cash.
- Dealing with telephone and written enquiries relating to plans.
- Completing annual reviews of a basic nature.

Key skills

- Good numeracy and communication skills.
- Ability to plan and organise own and other work.
- Good knowledge of superannuation.
- Good interpersonal and team member skills.

Internal contacts

Management, Superannuation department.

External contacts

Clients, Advisers, Industry Bodies and Associations.

Typical experience

At least 3 years of experience in Scheme Administration.

Other comments

Position Description

Position title:	**Scheme Administrator level 1 - 2**
Position code:	**FINASM.AO.RPPG.1**
Level:	**1**

Responsible for

Administrating a number of schemes or employer groups within a fund.

Report to

Scheme Administration Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Processing and checking new entrants for employers and benefit payments.
- Performing reconciliation of cash.
- Dealing with telephone and written inquiries relating to plans.
- Completing annual reviews of a basic nature.

Key skills

- Good numeracy and communication skills.
- Ability to plan and organise own and others work.
- Good knowledge of superannuation.
- Good interpersonal and team member skills.

Internal contacts

Management, Superannuation department.

External contacts

Clients

Typical experience

Up to 3 years of professional experience within Scheme Administration.

Other comments

Position Description

Position title:	**Manager - Unit Pricing**
Position code:	**FINASM.FU.PFMF.5**
Level:	**5**

Responsible for

Maintaining and enhancing all unit pricing processes and providing specialist advice to business units on related issues.

Report to

General Manager Accounts and Administration

Supervises

A small team of Unit Pricing staff.

Main activities

- Ensuring the accuracy of unit pricing procedures such as determining net asset values, unit prices, capital gains / losses, monthly accounts and cash projections.
- Identifying, developing and enhancing accounting procedures, policies and systems.
- Reporting on the implementation of new investment / funds strategies from a unit pricing perspective.
- Providing specialist advice to business units on issues such as taxation policies and investment implications as well as preparing reports on future accounting, taxation and trust issues.
- Identifying and providing the training required for Unit Pricing staff.

Key skills

- Sound understanding of Accounting Principles.
- High level numeracy and analytical skills.
- Ability to research, compile reports and present information including recommendations.
- Excellent management and organisational skills.

Internal contacts

Business Line Actuaries; Business Line Finance Managers; Business Line Marketing Managers; Group Actuarial

External contacts

Clients and Major Suppliers.

Typical experience

Will have at least 5 years of relevant experience in either Accounting, Finance or Funds Management. Tertiary qualifications in Accounting or other related discipline.

Other comments

Position Description

Position title:	**Senior Unit Pricing Analyst**
Position code:	**FINASM.FU.PFMF.4**
Level:	**4**

Responsible for

Undertaking more complex calculations, analysis and delivery of daily and weekly unit prices.

Report to

Unit Pricing Manager.

Supervises

May supervise Unit Pricing Analysts

Main activities

- Ensuring that appropriate controls and procedures are followed by the team to deliver accurate Unit Prices to all existing internal clients. The procedure extends to the appropriate portfolio analysis required to verify the result.
- Ensuring all valuation and unit price components adhere to the Compliance Plan and Risk Management controls of the unit. The Unit Price data is required to undergo periodic checks in order to comply with constitutions, disclosure documents, industry standards or guidelines, or otherwise general business rules as appropriate.
- Providing optimum client service in the form of delivering Unit Prices and attending to queries as required.
- Ensuring appropriate and sufficient management and tracking processes are in place for the efficient rectification of Unit Pricing errors and other issues affecting the business unit such as operations and staffing.
- Managing or assisting in key business projects as required.
- Conducting staff appraisals.

Key skills

- Strong problem solving and analytical skills.
- Self-motivated and goal driven.
- High level of organisational ability.
- High level of verbal and written communication skills.
- Strong customer service focus.
- Solid understanding of the valuation process including strong knowledge of Domestic and International marketable products such as equities, fixed interest, forward foreign exchange, swaps, futures and options.
- Advanced PC skills, particularly Excel (VBA an advantage).

Internal contacts

Investment Services, Master Trust Operations, Financial Accounting, Product and Technical Services.

External contacts

Typical experience

At least 3 - 5 years experience in Unit Pricing Analysis and/or Financial Services, coupled with tertiary qualifications in Business, majoring in Accounting, Finance or Economics. Will preferably have completed SIA studie

Other comments

Position Description

Position title:	**Unit Pricing Analyst**
Position code:	**FINASM.FU.PFMF.3**
Level:	**3**

Responsible for

Performing the accurate calculation, analysis and delivery of daily and weekly unit prices.

Report to

Unit Pricing Supervisor.

Supervises

No direct supervisory responsibilities.

Main activities

- Ensuring appropriate controls and procedures are followed to deliver accurate Unit Prices to all existing clients. The procedure extends to the appropriate portfolio analysis required to verify the result.
- Providing optimum client service in the form of delivering Unit Prices and attending to queries as required.
- Attending to queries and ad hoc requests initiated by Supervisor.
- Assisting in key business projects as required.

Key skills

- Ability to prioritise workloads in order to achieve targets.
- Strong problem solving and analytical skills.
- High level of organisational ability.
- Self-motivated and goal driven.
- Strong customer service focus.
- High level of verbal and written communication skills.
- Experience in Excel.

Internal contacts

Investment Services, Master Trust Operations, Financial Accounting, Product and Technical Services.

External contacts

Typical experience

2+ year experience in Unit Pricing Analysis and/or Financial Services, coupled with tertiary qualifications in Business, majoring in Accounting, Finance or Economics. May have completed SIA studies.

Other comments

Position Description

Position title:	**Assistant Unit Pricing Analyst**
Position code:	**FINASM.FU.PFMF.2**
Level:	**2**

Responsible for

Conducting all unit pricing processes and providing specialist advice to business units on related issues.

Report to

Manager Unit Trust, Financial Controller.

Supervises

No supervisory responsibilities.

Main activities

- Performing unit pricing functions such as calculating the value of net assets, unit prices, cash projections and capital gains / losses.
- Maintaining, entering and reconciling data used in the Unit Pricing process.
- Preparing monthly accounts and maintaining general ledger records.
- Ensuring the system reflects current tax and compliance legislation.
- Responding to enquiries from other Business Units and external clients.
- Assisting in the development of junior staff.

Key skills

- Strong written and oral communication skills.
- Computer literate with proficiency in relevant software packages.
- Excellent organisational and interpersonal skills.
- Solid numeracy and analytical skills.

Internal contacts

Business Line Actuaries; Business Line Finance Managers; Business Line Marketing Managers; Group Actuarial.

External contacts

Software Suppliers, Clients.

Typical experience

Will have 2 - 4 years relevant experience in either Accounting, Finance or Funds Management and tertiary qualifications in Accounting or another related discipline. May also have SIA qualifications.

Other comments

Position Description

Position title:	**Head of Provider Management**
Position code:	**FININS.PV.PVAH.6**
Level:	**6**

Responsible for

Leading the Provider Management team in maintaining a list of providers which delivers the best customer proposition at the lowest cost.

Report to

Chief Operating Officer

Supervises

Provider Managers, Team Leaders, and Specialists.

Main activities

- Formulating the provider management strategy and structure.
- Determining optimal funding models
- Developing a common framework to standardise the contract management process and minimise administration costs.
- Influencing the development of health funding policy that affects contract rates through participating in industry working groups and active lobbying.
- Overseeing the team to ensure that employees are engaged and meeting their goals.

Key skills

- In-depth knowledge of the structure of health financing in New Zealand.
- Strong communication relationship management skills.
- Excellent negotiation skills.
- Strong analytical skills.
- Excellent internal and external stakeholders management skills.
- Strong project management skills.

Internal contacts

Provider Management team, Process improvement team.

External contacts

Government and industry bodies.

Typical experience

Degree qualified in relevant area and extensive experience at senior level within the relevant sector.

Other comments

Position Description

Position title:	**Manager Provider Management**
Position code:	**FININS.PV.PVAH.5**
Level:	**5**

Responsible for

Managing the Provider Management team in maintaining a list of providers which delivers the best customer proposition at the lowest cost.

Report to

Head of Provider Management

Supervises

Provider Management Team Leaders and Specialists.

Main activities

- Supporting the Head of Provider Management in formulating the provider management strategy and structure.
- Ensuring the deployment of optimal funding models.
- Projecting financial impact of provider contracts and alternate contract terms.
- Ensuring the smooth operation and administration of provider arrangements.
- Resolving elevated and complex provider service complaints.
- Managing effective channels of communication with providers.
- Managing the team to ensure that employees are engaged and meeting their goals.

Key skills

- Knowledge of the structure of health financing in New Zealand.
- Strong communication relationship management skills.
- Excellent negotiation skills.
- Excellent internal and external stakeholders management skills.
- Superior problem solving skills.

Internal contacts

Provider Management team, finance team.

External contacts

Providers

Typical experience

Degree qualified in relevant area and experienced within the health insurance industry or hospital environment.

Other comments

Position Description

Position title:	**Provider Management Team Leader**
Position code:	**FININS.PV.PVAH.4**
Level:	**4**

Responsible for

Assisting the Provider Manager in maintaining a list of providers which delivers the best customer proposition at the lowest cost.

Report to

Provider Manager

Supervises

Provider Management Specialists

Main activities

- Adhering to the provider management strategy and structure.
- Deploying the optimal funding models.
- Assisting the Provider Manager Projecting financial impact of provider contracts and alternate contract terms.
- Ensuring the smooth operation and administration of provider arrangements.
- Resolving complex provider service complaints.
- Maintaining effective channels of communication with providers.
- Leading the team to ensure that employees are engaged and meeting their goals.

Key skills

- Knowledge of the structure of health financing in New Zealand.
- Strong communication relationship management skills.
- Excellent negotiation skills.
- Excellent internal and external stakeholders management skills.
- Strong problem solving skills.

Internal contacts

Provider Management team.

External contacts

Providers

Typical experience

Degree qualified in relevant area and experienced within the health insurance industry or hospital environment.

Other comments

Position Description

Position title:	**Provider Management Specialist**
Position code:	**FININS.PV.PVAH.3**
Level:	**3**

Responsible for

Maintaining a list of providers which delivers the best customer proposition at the lowest cost.

Report to

Provider Managerr Provider Management Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Adhering to the provider management strategy and structure.
- Ensuring the smooth operation and administration of provider arrangements.
- Resolving provider service complaints.
- Maintaining effective channels of communication with providers.
- Responding to provider queries and concerns.

Key skills

- Basic knowledge of the structure of health financing in New Zealand.
- Good communication and relationship management skills.
- Good internal and external stakeholders management skills.
- Excellent problem solving skills.

Internal contacts

Provider Management team.

External contacts

Providers

Typical experience

Degree qualified in relevant area and within the health insurance industry or hospital environment.

Other comments

Position Description

Position title:	**Provider Relations Coordinator**
Position code:	**FININS.PV.PVAH.2**
Level:	**2**

Responsible for

Coordinating the listing of providers and maintaining the providers database.

Report to

Provider Manager

Supervises

No supervisory responsibilities.

Main activities

- Monitoring the contract life-cycles and timelines.
- Preparing the contract documents according to the established framework.
- Providing support and assistance in relation to provider contract inquiries.
- Ensuring accurate data is recorded in a timely manner in the database.
- Monitoring any relevant legislative updates and communicate to stakeholders.

Key skills

- Understanding of the health insurance market.
- Intermediate to advanced Microsoft Word and Excel skills.
- Strong attention to detail.
- Ability to deal with conflicting deadlines.
- Excellent communication skills.

Internal contacts

Provider Management team and claims team.

External contacts

Providers

Typical experience

Relevant tertiary qualification and general health insurance knowledge.

Other comments

Position Description

Position title:	**Head of Product Commercial Lines**
Position code:	**FININS.PR.MACL.6**
Level:	**6**

Responsible for

Managing the development, market share and profitability of an organisation's portfolio of products.

Report to

Senior Management

Supervises

Product Managers

Main activities

- Overseeing the organisation's products offering or their delivery to market to maximise their growth and revenue.
- Liaising with other functions/department to improve product delivery by ensuring sound cooperation of design, materials, production methods, testing, and quality control.
- Directly influences the direction of the products and makes recommendations to enhance the products.
- Uses well developed industry knowledge to strategically direct product development.
- Responsible for the success of new product(s) initiatives.
- Formulating and controlling the department's budget.
- Manages key relationships with a variety of internal and external stakeholders.

Key skills

- Excellent knowledge of internal products, competitor’s products and the current market.
- Uses industry knowledge to predict future challenges for the product(s).
- Ability to solve complex problems with consideration to business impact.
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Ability to drive product development and growth through collaboration and stakeholders relationship management across the business and industry.

Internal contacts

Senior management, product management team, marketing team, sales team.

External contacts

External vendors, industry contacts, market research firms.

Typical experience

10+ years of experience in product management or similar experience with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Product Manager Commercial LInes**
Position code:	**FININS.PR.MACL.5**
Level:	**5**

Responsible for

Manages a large product or portfolio of products to maximise their revenue and growth.

Report to

Business Unit Head, Senior Management.

Supervises

May mentor more junior Product Managers.

Main activities

- Develops and drives the business case for changes to the product offering or its delivery to market to maximise product growth.
- Managing the entire product line life cycle from strategic planning to tactical activities.
- Responsible for the success of new product(s) initiatives.
- Directs and implements modifications to the product(s) to maximise product revenue and growth.
- Uses well developed industry knowledge to strategically direct product development.
- Liaises and instructs stakeholders in sales, marketing and finance to direct and improve product delivery.
- Instructs junior staff in relevant processes to assist in their development.

Key skills

- Ability to solve complex problems with consideration to business impact.
- Uses industry knowledge to predict future challenges for the product(s).
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Experienced in presenting and communicating with stakeholders to maximise product sales and revenue.
- Uses relationships across the business and industry to drive product development and growth.

Internal contacts

Senior management, sales, marketing and finance.

External contacts

End-users, industry contacts, market research firms, vendors.

Typical experience

5-8 years experience in product management, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Product Manager Commercial Lines**
Position code:	**FININS.PR.MACL.4**
Level:	**4**

Responsible for
Managing the development, market share and profitability of strategically important products or brands for either a particular product or industry.

Report to
Senior Product Manager, Business Unit Head.

Supervises
May supervise a Marketing Assistant.

Main activities
- Developing and/or Contributing significantly to the overall marketing strategy of a specific product or product line.
- Managing Product sales budgets and continually monitoring actual product performance against forecasted sales.
- Developing promotional/advertising strategies and collateral, often in conjunction with advertising agencies, that are consistent with corporate image and objectives.
- Coordinating all market research to ensure maximum target market intelligence.
- Identifying new marketing opportunities and analysing competitor activity.
- Playing a significant role in Product enhancement decisions.
- Assisting in the development of complex pricing and discount policies.
- Providing Product training to sales force.
- Overseeing Product design and enhancement activities.

Key skills
- Strong professional marketing skills.
- Analysing and interpreting market research data.
- Excellent communication skills, both written and verbal.

Internal contacts
Sales, Customer Support, Marketing Communications, Marketing Administration, Accounting, Human Resources/Training.

External contacts
Advertising Agencies, Market Research Companies, Product Promotion Companies, Public Relations Agencies, Customers, Government Officials.

Typical experience
Minimum 5 years commercial experience, coupled with a university degree in Business/Marketing or similar tertiary level qualification.

Other comments

Position Description

Position title:	**Associate Product Manager Commercial Lines**
Position code:	**FININS.PR.MACL.3**
Level:	**3**

Responsible for
Assisting the Product Managers in the development and maintenance of a product or portfolio of products to maximise their revenue and growth.

Report to
Manager - Product Management; Product Managers.

Supervises
No supervisory responsibilities.

Main activities
- Assisting in the development of product features to ensure a competitive and marketable range of products.
- Assisting in the development of sales ideas and promotional materials to support new and existing products.
- Ensuring all marketing support documentation is current and has received the appropriate compliance sign-off.
- Answering product related enquiries from staff and intermediaries.
- Assisting in the development of regular product communications to customers and advisers.
- Assisting with projects as required.

Key skills
- Sound understanding of the market.
- Good communication and interpersonal skills.
- Proficiency in Word and Excel.
- Ability to work in a team environment.
- Time management and ability to prioritise.

Internal contacts
Product Managers; the Sales & Marketing, Distribution, and Actuarial departments; Client Service staff.

External contacts
Advisors, Dealers.

Typical experience
3+ years of experience in Product Management, coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Head of Product Personal Lines**
Position code:	**FININS.PR.MAPL.6**
Level:	**6**

Responsible for

Managing the development, market share and profitability of an organisation's portfolio of products.

Report to

Senior Management

Supervises

Product Managers

Main activities

- Overseeing the organisation's products offering or their delivery to market to maximise their growth and revenue.
- Liaising with other functions/department to improve product delivery by ensuring sound cooperation of design, materials, production methods, testing, and quality control.
- Directly influences the direction of the products and makes recommendations to enhance the products.
- Uses well developed industry knowledge to strategically direct product development.
- Responsible for the success of new product(s) initiatives.
- Formulating and controlling the department's budget.
- Manages key relationships with a variety of internal and external stakeholders.

Key skills

- Excellent knowledge of internal products, competitor’s products and the current market.
- Uses industry knowledge to predict future challenges for the product(s).
- Ability to solve complex problems with consideration to business impact.
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Ability to drive product development and growth through collaboration and stakeholders relationship management across the business and industry.

Internal contacts

Senior management, product management team, marketing team, sales team.

External contacts

External vendors, industry contacts, market research firms.

Typical experience

10+ years of experience in product management or similar experience with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Product Manager Personal Lines**
Position code:	**FININS.PR.MAPL.5**
Level:	**5**

Responsible for

Manages a large product or portfolio of products to maximise their revenue and growth.

Report to

Business Unit Head, Senior Management.

Supervises

May mentor more junior Product Managers.

Main activities

- Develops and drives the business case for changes to the product offering or its delivery to market to maximise product growth.
- Managing the entire product line life cycle from strategic planning to tactical activities.
- Responsible for the success of new product(s) initiatives.
- Directs and implements modifications to the product(s) to maximise product revenue and growth.
- Uses well developed industry knowledge to strategically direct product development.
- Liaises and instructs stakeholders in sales, marketing and finance to direct and improve product delivery.
- Instructs junior staff in relevant processes to assist in their development.

Key skills

- Ability to solve complex problems with consideration to business impact.
- Uses industry knowledge to predict future challenges for the product(s).
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Experienced in presenting and communicating with stakeholders to maximise product sales and revenue.
- Uses relationships across the business and industry to drive product development and growth.

Internal contacts

Senior management, sales, marketing and finance.

External contacts

End-users, industry contacts, market research firms, vendors.

Typical experience

5-8 years experience in product management, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Product Manager Personal Lines**
Position code:	**FININS.PR.MAPL.4**
Level:	**4**

Responsible for

Managing the development, market share and profitability of strategically important products or brands for either a particular product or industry.

Report to

Senior Product Manager, Business Unit Head.

Supervises

May supervise a Marketing Assistant.

Main activities

- Developing and/or Contributing significantly to the overall marketing strategy of a specific product or product line.
- Managing Product sales budgets and continually monitoring actual product performance against forecasted sales.
- Developing promotional/advertising strategies and collateral, often in conjunction with advertising agencies, that are consistent with corporate image and objectives.
- Coordinating all market research to ensure maximum target market intelligence.
- Identifying new marketing opportunities and analysing competitor activity.
- Playing a significant role in Product enhancement decisions.
- Assisting in the development of complex pricing and discount policies.
- Providing Product training to sales force.
- Overseeing Product design and enhancement activities.

Key skills

- Strong professional marketing skills.
- Analysing and interpreting market research data.
- Excellent communication skills, both written and verbal.

Internal contacts

Sales, Customer Support, Marketing Communications, Marketing Administration, Accounting, Human Resources/Training.

External contacts

Advertising Agencies, Market Research Companies, Product Promotion Companies, Public Relations Agencies, Customers, Government Officials.

Typical experience

Minimum 5 years commercial experience, coupled with a university degree in Business/Marketing or similar tertiary level qualification.

Other comments

Position Description

Position title:	**Associate Product Manager Personal Lines**
Position code:	**FININS.PR.MAPL.3**
Level:	**3**

Responsible for
Assisting the Product Managers in the development and maintenance of a product or portfolio of products to maximise their revenue and growth.

Report to
Manager - Product Management; Product Managers.

Supervises
No supervisory responsibilities.

Main activities
- Assisting in the development of product features to ensure a competitive and marketable range of products.
- Assisting in the development of sales ideas and promotional materials to support new and existing products.
- Ensuring all marketing support documentation is current and has received the appropriate compliance sign-off.
- Answering product related enquiries from staff and intermediaries.
- Assisting in the development of regular product communications to customers and advisers.
- Assisting with projects as required.

Key skills
- Sound understanding of the market.
- Good communication and interpersonal skills.
- Proficiency in Word and Excel.
- Ability to work in a team environment.
- Time management and ability to prioritise.

Internal contacts
Product Managers; the Sales & Marketing, Distribution, and Actuarial departments; Client Service staff.

External contacts
Advisors, Dealers.

Typical experience
3+ years of experience in Product Management, coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Head of Product General Multi-Focus**
Position code:	**FININS.PR.MAMF.6**
Level:	**6**

Responsible for

Managing the development, market share and profitability of an organisation's portfolio of products.

Report to

Senior Management

Supervises

Product Managers

Main activities

- Overseeing the organisation's products offering or their delivery to market to maximise their growth and revenue.
- Liaising with other functions/department to improve product delivery by ensuring sound cooperation of design, materials, production methods, testing, and quality control.
- Directly influences the direction of the products and makes recommendations to enhance the products.
- Uses well developed industry knowledge to strategically direct product development.
- Responsible for the success of new product(s) initiatives.
- Formulating and controlling the department's budget.
- Manages key relationships with a variety of internal and external stakeholders.

Key skills

- Excellent knowledge of internal products, competitor's products and the current market.
- Uses industry knowledge to predict future challenges for the product(s).
- Ability to solve complex problems with consideration to business impact.
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Ability to drive product development and growth through collaboration and stakeholders relationship management across the business and industry.

Internal contacts

Senior management, product management team, marketing team, sales team.

External contacts

External vendors, industry contacts, market research firms.

Typical experience

10+ years of experience in product management or similar experience with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Product Manager General Multi-Focus**
Position code:	**FININS.PR.MAMF.5**
Level:	**5**

Responsible for

Manages a large product or portfolio of products to maximise their revenue and growth.

Report to

Business Unit Head, Senior Management.

Supervises

May mentor more junior Product Managers.

Main activities

- Develops and drives the business case for changes to the product offering or its delivery to market to maximise product growth.
- Managing the entire product line life cycle from strategic planning to tactical activities.
- Responsible for the success of new product(s) initiatives.
- Directs and implements modifications to the product(s) to maximise product revenue and growth.
- Uses well developed industry knowledge to strategically direct product development.
- Liaises and instructs stakeholders in sales, marketing and finance to direct and improve product delivery.
- Instructs junior staff in relevant processes to assist in their development.

Key skills

- Ability to solve complex problems with consideration to business impact.
- Uses industry knowledge to predict future challenges for the product(s).
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Experienced in presenting and communicating with stakeholders to maximise product sales and revenue.
- Uses relationships across the business and industry to drive product development and growth.

Internal contacts

Senior management, sales, marketing and finance.

External contacts

End-users, industry contacts, market research firms, vendors.

Typical experience

5-8 years experience in product management, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Product Manager General Multi-Focus**
Position code:	**FININS.PR.MAMF.4**
Level:	**4**

Responsible for

Managing the development, market share and profitability of strategically important products or brands for either a particular product or industry.

Report to

Senior Product Manager, Business Unit Head.

Supervises

May supervise a Marketing Assistant.

Main activities

- Developing and/or Contributing significantly to the overall marketing strategy of a specific product or product line.
- Managing Product sales budgets and continually monitoring actual product performance against forecasted sales.
- Developing promotional/advertising strategies and collateral, often in conjunction with advertising agencies, that are consistent with corporate image and objectives.
- Coordinating all market research to ensure maximum target market intelligence.
- Identifying new marketing opportunities and analysing competitor activity.
- Playing a significant role in Product enhancement decisions.
- Assisting in the development of complex pricing and discount policies.
- Providing Product training to sales force.
- Overseeing Product design and enhancement activities.

Key skills

- Strong professional marketing skills.
- Analysing and interpreting market research data.
- Excellent communication skills, both written and verbal.

Internal contacts

Sales, Customer Support, Marketing Communications, Marketing Administration, Accounting, Human Resources/Training.

External contacts

Advertising Agencies, Market Research Companies, Product Promotion Companies, Public Relations Agencies, Customers, Government Officials.

Typical experience

Minimum 5 years commercial experience, coupled with a university degree in Business/Marketing or similar tertiary level qualification.

Other comments

Position Description

Position title:	**Associate Product Manager General Multi-Focus**
Position code:	**FININS.PR.MAMF.3**
Level:	**3**

Responsible for

Assisting the Product Managers in the development and maintenance of a product or portfolio of products to maximise their revenue and growth.

Report to

Manager - Product Management; Product Managers.

Supervises

No supervisory responsibilities.

Main activities

- Assisting in the development of product features to ensure a competitive and marketable range of products.
- Assisting in the development of sales ideas and promotional materials to support new and existing products.
- Ensuring all marketing support documentation is current and has received the appropriate compliance sign-off.
- Answering product related enquiries from staff and intermediaries.
- Assisting in the development of regular product communications to customers and advisers.
- Assisting with projects as required.

Key skills

- Sound understanding of the market.
- Good communication and interpersonal skills.
- Proficiency in Word and Excel.
- Ability to work in a team environment.
- Time management and ability to prioritise.

Internal contacts

Product Managers; the Sales & Marketing, Distribution, and Actuarial departments; Client Service staff.

External contacts

Advisors, Dealers.

Typical experience

3+ years of experience in Product Management, coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Head of Product Group Life**
Position code:	**FININS.PR.MAGP.6**
Level:	**6**

Responsible for

Managing the development, market share and profitability of an organisation's portfolio of products.

Report to

Senior Management

Supervises

Product Managers

Main activities

- Overseeing the organisation's products offering or their delivery to market to maximise their growth and revenue.
- Liaising with other functions/department to improve product delivery by ensuring sound cooperation of design, materials, production methods, testing, and quality control.
- Directly influences the direction of the products and makes recommendations to enhance the products.
- Uses well developed industry knowledge to strategically direct product development.
- Responsible for the success of new product(s) initiatives.
- Formulating and controlling the department's budget.
- Manages key relationships with a variety of internal and external stakeholders.

Key skills

- Excellent knowledge of internal products, competitor’s products and the current market.
- Uses industry knowledge to predict future challenges for the product(s).
- Ability to solve complex problems with consideration to business impact.
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Ability to drive product development and growth through collaboration and stakeholders relationship management across the business and industry.

Internal contacts

Senior management, product management team, marketing team, sales team.

External contacts

External vendors, industry contacts, market research firms.

Typical experience

10+ years of experience in product management or similar experience with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Product Manager Group Life**
Position code:	**FININS.PR.MAGP.5**
Level:	**5**

Responsible for

Manages a large product or portfolio of products to maximise their revenue and growth.

Report to

Business Unit Head, Senior Management.

Supervises

May mentor more junior Product Managers.

Main activities

- Develops and drives the business case for changes to the product offering or its delivery to market to maximise product growth.
- Managing the entire product line life cycle from strategic planning to tactical activities.
- Responsible for the success of new product(s) initiatives.
- Directs and implements modifications to the product(s) to maximise product revenue and growth.
- Uses well developed industry knowledge to strategically direct product development.
- Liaises and instructs stakeholders in sales, marketing and finance to direct and improve product delivery.
- Instructs junior staff in relevant processes to assist in their development.

Key skills

- Ability to solve complex problems with consideration to business impact.
- Uses industry knowledge to predict future challenges for the product(s).
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Experienced in presenting and communicating with stakeholders to maximise product sales and revenue.
- Uses relationships across the business and industry to drive product development and growth.

Internal contacts

Senior management, sales, marketing and finance.

External contacts

End-users, industry contacts, market research firms, vendors.

Typical experience

5-8 years experience in product management, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Product Manager Group Life**
Position code:	**FININS.PR.MAGP.4**
Level:	**4**

Responsible for

Managing the development, market share and profitability of strategically important products or brands for either a particular product or industry.

Report to

Senior Product Manager, Business Unit Head.

Supervises

May supervise a Marketing Assistant.

Main activities

- Developing and/or Contributing significantly to the overall marketing strategy of a specific product or product line.
- Managing Product sales budgets and continually monitoring actual product performance against forecasted sales.
- Developing promotional/advertising strategies and collateral, often in conjunction with advertising agencies, that are consistent with corporate image and objectives.
- Coordinating all market research to ensure maximum target market intelligence.
- Identifying new marketing opportunities and analysing competitor activity.
- Playing a significant role in Product enhancement decisions.
- Assisting in the development of complex pricing and discount policies.
- Providing Product training to sales force.
- Overseeing Product design and enhancement activities.

Key skills

- Strong professional marketing skills.
- Analysing and interpreting market research data.
- Excellent communication skills, both written and verbal.

Internal contacts

Sales, Customer Support, Marketing Communications, Marketing Administration, Accounting, Human Resources/Training.

External contacts

Advertising Agencies, Market Research Companies, Product Promotion Companies, Public Relations Agencies, Customers, Government Officials.

Typical experience

Minimum 5 years commercial experience, coupled with a university degree in Business/Marketing or similar tertiary level qualification.

Other comments

Position Description

Position title:	**Associate Product Manager Group Life**
Position code:	**FININS.PR.MAGP.3**
Level:	**3**

Responsible for

Assisting the Product Managers in the development and maintenance of a product or portfolio of products to maximise their revenue and growth.

Report to

Manager - Product Management; Product Managers.

Supervises

No supervisory responsibilities.

Main activities

- Assisting in the development of product features to ensure a competitive and marketable range of products.
- Assisting in the development of sales ideas and promotional materials to support new and existing products.
- Ensuring all marketing support documentation is current and has received the appropriate compliance sign-off.
- Answering product related enquiries from staff and intermediaries.
- Assisting in the development of regular product communications to customers and advisers.
- Assisting with projects as required.

Key skills

- Sound understanding of the market.
- Good communication and interpersonal skills.
- Proficiency in Word and Excel.
- Ability to work in a team environment.
- Time management and ability to prioritise.

Internal contacts

Product Managers; the Sales & Marketing, Distribution, and Actuarial departments; Client Service staff.

External contacts

Advisors, Dealers.

Typical experience

3+ years of experience in Product Management, coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Head of Product Individual Life**
Position code:	**FININS.PR.MAIP.6**
Level:	**6**

Responsible for

Managing the development, market share and profitability of an organisation's portfolio of products.

Report to

Senior Management

Supervises

Product Managers

Main activities

- Overseeing the organisation's products offering or their delivery to market to maximise their growth and revenue.
- Liaising with other functions/department to improve product delivery by ensuring sound cooperation of design, materials, production methods, testing, and quality control.
- Directly influences the direction of the products and makes recommendations to enhance the products.
- Uses well developed industry knowledge to strategically direct product development.
- Responsible for the success of new product(s) initiatives.
- Formulating and controlling the department's budget.
- Manages key relationships with a variety of internal and external stakeholders.

Key skills

- Excellent knowledge of internal products, competitor's products and the current market.
- Uses industry knowledge to predict future challenges for the product(s).
- Ability to solve complex problems with consideration to business impact.
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Ability to drive product development and growth through collaboration and stakeholders relationship management across the business and industry.

Internal contacts

Senior management, product management team, marketing team, sales team.

External contacts

External vendors, industry contacts, market research firms.

Typical experience

10+ years of experience in product management or similar experience with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Product Manager Individual Life**
Position code:	**FININS.PR.MAIP.5**
Level:	**5**

Responsible for

Manages a large product or portfolio of products to maximise their revenue and growth.

Report to

Business Unit Head, Senior Management.

Supervises

May mentor more junior Product Managers.

Main activities

- Develops and drives the business case for changes to the product offering or its delivery to market to maximise product growth.
- Managing the entire product line life cycle from strategic planning to tactical activities.
- Responsible for the success of new product(s) initiatives.
- Directs and implements modifications to the product(s) to maximise product revenue and growth.
- Uses well developed industry knowledge to strategically direct product development.
- Liaises and instructs stakeholders in sales, marketing and finance to direct and improve product delivery.
- Instructs junior staff in relevant processes to assist in their development.

Key skills

- Ability to solve complex problems with consideration to business impact.
- Uses industry knowledge to predict future challenges for the product(s).
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Experienced in presenting and communicating with stakeholders to maximise product sales and revenue.
- Uses relationships across the business and industry to drive product development and growth.

Internal contacts

Senior management, sales, marketing and finance.

External contacts

End-users, industry contacts, market research firms, vendors.

Typical experience

5-8 years experience in product management, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Product Manager Individual Life**
Position code:	**FININS.PR.MAIP.4**
Level:	**4**

Responsible for

Managing the development, market share and profitability of strategically important products or brands for either a particular product or industry.

Report to

Senior Product Manager, Business Unit Head.

Supervises

May supervise a Marketing Assistant.

Main activities

- Developing and/or Contributing significantly to the overall marketing strategy of a specific product or product line.
- Managing Product sales budgets and continually monitoring actual product performance against forecasted sales.
- Developing promotional/advertising strategies and collateral, often in conjunction with advertising agencies, that are consistent with corporate image and objectives.
- Coordinating all market research to ensure maximum target market intelligence.
- Identifying new marketing opportunities and analysing competitor activity.
- Playing a significant role in Product enhancement decisions.
- Assisting in the development of complex pricing and discount policies.
- Providing Product training to sales force.
- Overseeing Product design and enhancement activities.

Key skills

- Strong professional marketing skills.
- Analysing and interpreting market research data.
- Excellent communication skills, both written and verbal.

Internal contacts

Sales, Customer Support, Marketing Communications, Marketing Administration, Accounting, Human Resources/Training.

External contacts

Advertising Agencies, Market Research Companies, Product Promotion Companies, Public Relations Agencies, Customers, Government Officials.

Typical experience

Minimum 5 years commercial experience, coupled with a university degree in Business/Marketing or similar tertiary level qualification.

Other comments

Position Description

Position title:	**Associate Product Manager Individual Life**
Position code:	**FININS.PR.MAIP.3**
Level:	**3**

Responsible for

Assisting the Product Managers in the development and maintenance of a product or portfolio of products to maximise their revenue and growth.

Report to

Manager - Product Management; Product Managers.

Supervises

No supervisory responsibilities.

Main activities

- Assisting in the development of product features to ensure a competitive and marketable range of products.
- Assisting in the development of sales ideas and promotional materials to support new and existing products.
- Ensuring all marketing support documentation is current and has received the appropriate compliance sign-off.
- Answering product related enquiries from staff and intermediaries.
- Assisting in the development of regular product communications to customers and advisers.
- Assisting with projects as required.

Key skills

- Sound understanding of the market.
- Good communication and interpersonal skills.
- Proficiency in Word and Excel.
- Ability to work in a team environment.
- Time management and ability to prioritise.

Internal contacts

Product Managers; the Sales & Marketing, Distribution, and Actuarial departments; Client Service staff.

External contacts

Advisors, Dealers.

Typical experience

3+ years of experience in Product Management, coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Head of Product General Multi-Focus**
Position code:	**FININS.PR.MALP.6**
Level:	**6**

Responsible for

Managing the development, market share and profitability of an organisation's portfolio of products.

Report to

Senior Management

Supervises

Product Managers

Main activities

- Overseeing the organisation's products offering or their delivery to market to maximise their growth and revenue.
- Liaising with other functions/department to improve product delivery by ensuring sound cooperation of design, materials, production methods, testing, and quality control.
- Directly influences the direction of the products and makes recommendations to enhance the products.
- Uses well developed industry knowledge to strategically direct product development.
- Responsible for the success of new product(s) initiatives.
- Formulating and controlling the department's budget.
- Manages key relationships with a variety of internal and external stakeholders.

Key skills

- Excellent knowledge of internal products, competitor's products and the current market.
- Uses industry knowledge to predict future challenges for the product(s).
- Ability to solve complex problems with consideration to business impact.
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Ability to drive product development and growth through collaboration and stakeholders relationship management across the business and industry.

Internal contacts

Senior management, product management team, marketing team, sales team.

External contacts

External vendors, industry contacts, market research firms.

Typical experience

10+ years of experience in product management or similar experience with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Product Manager General Multi-Focus**
Position code:	**FININS.PR.MALP.5**
Level:	**5**

Responsible for
Manages a large product or portfolio of products to maximise their revenue and growth.

Report to
Business Unit Head, Senior Management.

Supervises
May mentor more junior Product Managers.

Main activities
- Develops and drives the business case for changes to the product offering or its delivery to market to maximise product growth.
- Managing the entire product line life cycle from strategic planning to tactical activities.
- Responsible for the success of new product(s) initiatives.
- Directs and implements modifications to the product(s) to maximise product revenue and growth.
- Uses well developed industry knowledge to strategically direct product development.
- Liaises and instructs stakeholders in sales, marketing and finance to direct and improve product delivery.
- Instructs junior staff in relevant processes to assist in their development.

Key skills
- Ability to solve complex problems with consideration to business impact.
- Uses industry knowledge to predict future challenges for the product(s).
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Experienced in presenting and communicating with stakeholders to maximise product sales and revenue.
- Uses relationships across the business and industry to drive product development and growth.

Internal contacts
Senior management, sales, marketing and finance.

External contacts
End-users, industry contacts, market research firms, vendors.

Typical experience
5-8 years experience in product management, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Product Manager General Multi-Focus**
Position code:	**FININS.PR.MALP.4**
Level:	**4**

Responsible for

Managing the development, market share and profitability of strategically important products or brands for either a particular product or industry.

Report to

Senior Product Manager, Business Unit Head.

Supervises

May supervise a Marketing Assistant.

Main activities

- Developing and/or Contributing significantly to the overall marketing strategy of a specific product or product line.
- Managing Product sales budgets and continually monitoring actual product performance against forecasted sales.
- Developing promotional/advertising strategies and collateral, often in conjunction with advertising agencies, that are consistent with corporate image and objectives.
- Coordinating all market research to ensure maximum target market intelligence.
- Identifying new marketing opportunities and analysing competitor activity.
- Playing a significant role in Product enhancement decisions.
- Assisting in the development of complex pricing and discount policies.
- Providing Product training to sales force.
- Overseeing Product design and enhancement activities.

Key skills

- Strong professional marketing skills.
- Analysing and interpreting market research data.
- Excellent communication skills, both written and verbal.

Internal contacts

Sales, Customer Support, Marketing Communications, Marketing Administration, Accounting, Human Resources/Training.

External contacts

Advertising Agencies, Market Research Companies, Product Promotion Companies, Public Relations Agencies, Customers, Government Officials.

Typical experience

Minimum 5 years commercial experience, coupled with a university degree in Business/Marketing or similar tertiary level qualification.

Other comments

Position Description

Position title:	**Associate Product Manager General Multi-Focus**
Position code:	**FININS.PR.MALP.3**
Level:	**3**

Responsible for

Assisting the Product Managers in the development and maintenance of a product or portfolio of products to maximise their revenue and growth.

Report to

Manager - Product Management; Product Managers.

Supervises

No supervisory responsibilities.

Main activities

- Assisting in the development of product features to ensure a competitive and marketable range of products.
- Assisting in the development of sales ideas and promotional materials to support new and existing products.
- Ensuring all marketing support documentation is current and has received the appropriate compliance sign-off.
- Answering product related enquiries from staff and intermediaries.
- Assisting in the development of regular product communications to customers and advisers.
- Assisting with projects as required.

Key skills

- Sound understanding of the market.
- Good communication and interpersonal skills.
- Proficiency in Word and Excel.
- Ability to work in a team environment.
- Time management and ability to prioritise.

Internal contacts

Product Managers; the Sales & Marketing, Distribution, and Actuarial departments; Client Service staff.

External contacts

Advisors, Dealers.

Typical experience

3+ years of experience in Product Management, coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 6**
Position code:	**FININS.PR.MA00.6**
Level:	**6**

Responsible for

Managing the development, market share and profitability of an organisation's portfolio of products.

Report to

Senior Management

Supervises

Product Managers

Main activities

- Overseeing the organisation's products offering or their delivery to market to maximise their growth and revenue.
- Liaising with other functions/department to improve product delivery by ensuring sound cooperation of design, materials, production methods, testing, and quality control.
- Directly influences the direction of the products and makes recommendations to enhance the products.
- Uses well developed industry knowledge to strategically direct product development.
- Responsible for the success of new product(s) initiatives.
- Formulating and controlling the department's budget.
- Manages key relationships with a variety of internal and external stakeholders.

Key skills

- Excellent knowledge of internal products, competitor's products and the current market.
- Uses industry knowledge to predict future challenges for the product(s).
- Ability to solve complex problems with consideration to business impact.
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Ability to drive product development and growth through collaboration and stakeholders relationship management across the business and industry.

Internal contacts

Senior management, product management team, marketing team, sales team.

External contacts

External vendors, industry contacts, market research firms.

Typical experience

10+ years of experience in product management or similar experience with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 5**
Position code:	**FININS.PR.MA00.5**
Level:	**5**

Responsible for

Manages a large product or portfolio of products to maximise their revenue and growth.

Report to

Business Unit Head, Senior Management.

Supervises

May mentor more junior Product Managers.

Main activities

- Develops and drives the business case for changes to the product offering or its delivery to market to maximise product growth.
- Managing the entire product line life cycle from strategic planning to tactical activities.
- Responsible for the success of new product(s) initiatives.
- Directs and implements modifications to the product(s) to maximise product revenue and growth.
- Uses well developed industry knowledge to strategically direct product development.
- Liaises and instructs stakeholders in sales, marketing and finance to direct and improve product delivery.
- Instructs junior staff in relevant processes to assist in their development.

Key skills

- Ability to solve complex problems with consideration to business impact.
- Uses industry knowledge to predict future challenges for the product(s).
- Combination of technical aptitude, commercial, and product management skills, communication, negotiation and decision-making ability.
- Experienced in presenting and communicating with stakeholders to maximise product sales and revenue.
- Uses relationships across the business and industry to drive product development and growth.

Internal contacts

Senior management, sales, marketing and finance.

External contacts

End-users, industry contacts, market research firms, vendors.

Typical experience

5-8 years experience in product management, coupled with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 4**
Position code:	**FININS.PR.MA00.4**
Level:	**4**

Responsible for

Managing the development, market share and profitability of strategically important products or brands for either a particular product or industry.

Report to

Senior Product Manager, Business Unit Head.

Supervises

May supervise a Marketing Assistant.

Main activities

- Developing and/or Contributing significantly to the overall marketing strategy of a specific product or product line.
- Managing Product sales budgets and continually monitoring actual product performance against forecasted sales.
- Developing promotional/advertising strategies and collateral, often in conjunction with advertising agencies, that are consistent with corporate image and objectives.
- Coordinating all market research to ensure maximum target market intelligence.
- Identifying new marketing opportunities and analysing competitor activity.
- Playing a significant role in Product enhancement decisions.
- Assisting in the development of complex pricing and discount policies.
- Providing Product training to sales force.
- Overseeing Product design and enhancement activities.

Key skills

- Strong professional marketing skills.
- Analysing and interpreting market research data.
- Excellent communication skills, both written and verbal.

Internal contacts

Sales, Customer Support, Marketing Communications, Marketing Administration, Accounting, Human Resources/Training.

External contacts

Advertising Agencies, Market Research Companies, Product Promotion Companies, Public Relations Agencies, Customers, Government Officials.

Typical experience

Minimum 5 years commercial experience, coupled with a university degree in Business/Marketing or similar tertiary level qualification.

Other comments

Position Description

Position title:	**Multi-Area - Combined - Level 3**
Position code:	**FININS.PR.MA00.3**
Level:	**3**

Responsible for

Assisting the Product Managers in the development and maintenance of a product or portfolio of products to maximise their revenue and growth.

Report to

Manager - Product Management; Product Managers.

Supervises

No supervisory responsibilities.

Main activities

- Assisting in the development of product features to ensure a competitive and marketable range of products.
- Assisting in the development of sales ideas and promotional materials to support new and existing products.
- Ensuring all marketing support documentation is current and has received the appropriate compliance sign-off.
- Answering product related enquiries from staff and intermediaries.
- Assisting in the development of regular product communications to customers and advisers.
- Assisting with projects as required.

Key skills

- Sound understanding of the market.
- Good communication and interpersonal skills.
- Proficiency in Word and Excel.
- Ability to work in a team environment.
- Time management and ability to prioritise.

Internal contacts

Product Managers; the Sales & Marketing, Distribution, and Actuarial departments; Client Service staff.

External contacts

Advisors, Dealers.

Typical experience

3+ years of experience in Product Management, coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Chief Underwriter Multi-Focus**
Position code:	**FININS.IU.CUMF.7**
Level:	**7**

Responsible for

Managing the underwriting processes so that profitable business is accepted, ethical standards are observed and the relationship between the company and agents are developed and maintained.

Report to

Life Manager, General Manager - Operations or Chief Actuary.

Supervises

Senior Underwriters. Note: In a large company, this may be a purely technical position with no management responsibility.

Main activities

- Managing, training and developing staff responsible for the underwriting of Life and Disability insurance business.
- Establishing, maintaining and developing underwriting policy for all life and disability insurance.
- Maintaining underwriting standards consistent with established policy.
- Making ultimate decisions on risks refereed by subordinate Underwriters.
- Advising, assisting and specifying underwriting requirements for product developments.
- Ensuring appropriate reinsurance is placed according to limits of retention as specified by the Actuary.
- Preparing expense forecasts and monitoring budget performance.

Key skills

- Management expertise.
- Demonstrated knowledge of underwriting practices and procedures.
- Demonstrated knowledge and understanding of the Company Vision and business regulations.
- Knowledge of medical terminology.

Internal contacts

Senior Management; Manager; Underwriters; Sales Managers; Unit Managers; Customer Service.

External contacts

Agents/Advisers.

Typical experience

At least 15 years experience in underwriting, together with relevant qualifications.

Other comments

Position Description

Position title:	**National Underwriting Manager Commercial Liability**
Position code:	**FININS.IU.UNGL.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting Manager Commercial Liability**
Position code:	**FININS.IU.UNGL.5**
Level:	**5**

Responsible for

Commercial Liability, also known as casualty, including product and 'slip and trip'.

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Senior Underwriter Commercial Liability**
Position code:	**FININS.IU.UNGL.4**
Level:	**4**

Responsible for

Commercial Liability, also known as casualty, including product and 'slip and trip'.
Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriter Commercial Liability**
Position code:	**FININS.IU.UNGL.3**
Level:	**3**

Responsible for

Commercial Liability, also known as casualty, including product and 'slip and trip'.
Underwriting all new and existing classes of business within set Underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager.

Supervises

Main activities

- Underwriting new and existing business.
- Ensuring quality of Underwriting activities is within limitations of organisation policy and in accordance with Underwriting standards.
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio.
- Identifying need for review of proposal assessments.
- Monitoring and reviewing Underwriting standards procedures and checklists.
- Identifying Underwriting requirements to meet business needs.
- Reviewing and analysing research results.
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation.
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional Underwriting service to brokers and clients.
- Ability to ensure quality of Underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within organisation guidelines and standards.

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Underwriting Manager Commercial Motor**
Position code:	**FININS.IU.UNMO.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting Manager Commercial Motor**
Position code:	**FININS.IU.UNMO.5**
Level:	**5**

Responsible for

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Senior Underwriter Commercial Motor**
Position code:	**FININS.IU.UNMO.4**
Level:	**4**

Responsible for

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Supervision of Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting company's risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and is responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriter Commercial Motor**
Position code:	**FININS.IU.UNMO.3**
Level:	**3**

Responsible for

Underwriting all new and existing classes of business within set Underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager.

Supervises

Main activities

- Underwriting new and existing business.
- Ensuring quality of Underwriting activities is within limitations of organisation policy and in accordance with Underwriting standards.
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio.
- Identifying need for review of proposal assessments.
- Monitoring and reviewing Underwriting standards procedures and checklists.
- Identifying Underwriting requirements to meet business needs.
- Reviewing and analysing research results.
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation.
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional Underwriting service to brokers and clients.
- Ability to ensure quality of Underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within organisation guidelines and standards.

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Underwriting Manager Commercial Property**
Position code:	**FININS.IU.UNPR.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting Manager Commercial Property**
Position code:	**FININS.IU.UNPR.5**
Level:	**5**

Responsible for

Commercial Property including: Energy, Engineering and Construction.

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Senior Underwriter Commercial Property**
Position code:	**FININS.IU.UNPR.4**
Level:	**4**

Responsible for

Commercial Property including: Energy, Engineering and Construction.
Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriter Commercial Property**
Position code:	**FININS.IU.UNPR.3**
Level:	**3**

Responsible for

Commercial Property including: Energy, Engineering and Construction.
Underwriting all new and existing classes of business within set Underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager.

Supervises

Main activities

- Underwriting new and existing business.
- Ensuring quality of Underwriting activities is within limitations of organisation policy and in accordance with Underwriting standards.
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio.
- Identifying need for review of proposal assessments.
- Monitoring and reviewing Underwriting standards procedures and checklists.
- Identifying Underwriting requirements to meet business needs.
- Reviewing and analysing research results.
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation.
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional Underwriting service to brokers and clients.
- Ability to ensure quality of Underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within organisation guidelines and standards.

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Underwriting Manager Specialties - Marine**
Position code:	**FININS.IU.UNMA.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting Manager Specialties - Marine**
Position code:	**FININS.IU.UNMA.5**
Level:	**5**

Responsible for

Marine including: Hull and/or Cargo.

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Senior Underwriter Specialties - Marine**
Position code:	**FININS.IU.UNMA.4**
Level:	**4**

Responsible for

Marine including: Hull and/or Cargo.

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriter Specialties - Marine**
Position code:	**FININS.IU.UNMA.3**
Level:	**3**

Responsible for

Marine including: Hull and/or Cargo.

Underwriting all new and existing classes of business within set Underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager.

Supervises

Main activities

- Underwriting new and existing business.
- Ensuring quality of Underwriting activities is within limitations of organisation policy and in accordance with Underwriting standards.
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio.
- Identifying need for review of proposal assessments.
- Monitoring and reviewing Underwriting standards procedures and checklists.
- Identifying Underwriting requirements to meet business needs.
- Reviewing and analysing research results.
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation.
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional Underwriting service to brokers and clients.
- Ability to ensure quality of Underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within organisation guidelines and standards.

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Underwriting Manager Specialties - Rural**
Position code:	**FININS.IU.UNCR.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting Manager Specialties - Rural**
Position code:	**FININS.IU.UNCR.5**
Level:	**5**

Responsible for

Servicing rural clients.

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to intermediaries
- Developing the technical expertise of all underwriting staff and effectively managing staff and their performance
- Establishing budgets and maintaining credit control of business
- Identifying need for review of proposal assessment
- Identifying underwriting requirements to meet business needs
- Reviewing variations from proposal assessments
- Establishing guidelines, plans and priorities for monitoring and approving underwriting standards

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups
- Ability to define characteristics of underwriting with current approaches.
- Flexible approach and dedication to duties
- In depth knowledge of underwriting and company infrastructure

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience. Fellowship or equivalent

Other comments

Position Description

Position title:	**Senior Underwriter Specialties - Rural**
Position code:	**FININS.IU.UNCR.4**
Level:	**4**

Responsible for

Services rural clients.

Efficiently and effectively handling complex underwriting enquires to maintain strict underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager

Supervises

Supervision of underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter

Main activities

- Underwriting complex risks that fall within defined limits of authority
- Assisting in the development of underwriting standards and conducting audits on underwriting files to ensure standards are maintained
- Achieving planned underwriting results for new and existing business and identifying underwriting requirements to meet business needs.
- Protecting company's risk exposure by applying retention limits, arranging reinsurance and observing underwriting guidelines
- Monitoring and reviewing underwriting standards procedures and checklists.
- Reviewing and analysing research results
- Reviewing variations from usual proposal standards
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for underwriting activities and is responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines
- Ability to provide professional level of service to intermediaries and brokers and to support all use of underwriting by others.
- Ability to find possible solutions to complex underwriting problems within defined guidelines.
- In depth knowledge of underwriting and excellent knowledge of the company structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriter Specialties - Rural**
Position code:	**FININS.IU.UNCR.3**
Level:	**3**

Responsible for

Services rural clients. Efficiently and effectively handling underwriting enquires to maintain strict underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager

Supervises

N/A

Main activities

- Underwriting new and existing business
- Ensuring quality of underwriting activities is within limitations of company policy and in accordance with underwriting standards
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing underwriting guidelines
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio
- Identifying need for review of proposal assessments Monitoring and reviewing underwriting standards procedures and checklists.
- Identifying underwriting requirements to meet business needs.
- Reviewing and analysing research results
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of installment system and account reconciliation Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional underwriting service to brokers and clients
- Ability to ensure quality of underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within company guidelines and standards

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Underwriting Manager Specialties - Other**
Position code:	**FININS.IU.UNSL.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting Manager Specialties - Other**
Position code:	**FININS.IU.UNSL.5**
Level:	**5**

Responsible for

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Senior Underwriter Specialties - Other**
Position code:	**FININS.IU.UNSL.4**
Level:	**4**

Responsible for

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriter Specialties - Other**
Position code:	**FININS.IU.UNSL.3**
Level:	**3**

Responsible for

Underwriting all new and existing classes of business within set underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager

Supervises

Main activities

- Underwriting new and existing business
- Ensuring quality of underwriting activities is within limitations of company policy and in accordance with underwriting standards
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing underwriting guidelines
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio
- Identifying need for review of proposal assessments
- Monitoring and reviewing underwriting standards procedures and checklists.
- Identifying underwriting requirements to meet business needs.
- Reviewing and analysing research results
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional underwriting service to brokers and clients
- Ability to ensure quality of underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within company guidelines and standards

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Underwriting Manager Personal Lines**
Position code:	**FININS.IU.UNPL.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting Manager Personal Lines**
Position code:	**FININS.IU.UNPL.5**
Level:	**5**

Responsible for

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Senior Underwriter Personal Lines**
Position code:	**FININS.IU.UNPL.4**
Level:	**4**

Responsible for

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriter Personal Lines**
Position code:	**FININS.IU.UNPL.3**
Level:	**3**

Responsible for

Underwriting all new and existing classes of business within set underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager

Supervises

Main activities

- Underwriting new and existing business
- Ensuring quality of underwriting activities is within limitations of company policy and in accordance with underwriting standards
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing underwriting guidelines
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio
- Identifying need for review of proposal assessments
- Monitoring and reviewing underwriting standards procedures and checklists.
- Identifying underwriting requirements to meet business needs.
- Reviewing and analysing research results
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional underwriting service to brokers and clients
- Ability to ensure quality of underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within company guidelines and standards

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Underwriting Manager Group Life**
Position code:	**FININS.IU.UNGP.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting Manager Group Life**
Position code:	**FININS.IU.UNGP.5**
Level:	**5**

Responsible for

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Underwriting Team Leader Group Life**
Position code:	**FININS.IU.UNGP.4**
Level:	**4**

Responsible for

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriter Group Life**
Position code:	**FININS.IU.UNGP.3**
Level:	**3**

Responsible for

Underwriting all new and existing classes of business within set underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager

Supervises

Main activities

- Underwriting new and existing business
- Ensuring quality of underwriting activities is within limitations of company policy and in accordance with underwriting standards
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing underwriting guidelines
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio
- Identifying need for review of proposal assessments
- Monitoring and reviewing underwriting standards procedures and checklists.
- Identifying underwriting requirements to meet business needs.
- Reviewing and analysing research results
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional underwriting service to brokers and clients
- Ability to ensure quality of underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within company guidelines and standards

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Underwriting Manager Individual Life**
Position code:	**FININS.IU.UNIP.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting Manager Individual Life**
Position code:	**FININS.IU.UNIP.5**
Level:	**5**

Responsible for

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Underwriting Team Leader Individual Life**
Position code:	**FININS.IU.UNIP.4**
Level:	**4**

Responsible for

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriter Individual Life**
Position code:	**FININS.IU.UNIP.3**
Level:	**3**

Responsible for

Underwriting all new and existing classes of business within set underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager

Supervises

Main activities

- Underwriting new and existing business
- Ensuring quality of underwriting activities is within limitations of company policy and in accordance with underwriting standards
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing underwriting guidelines
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio
- Identifying need for review of proposal assessments
- Monitoring and reviewing underwriting standards procedures and checklists.
- Identifying underwriting requirements to meet business needs.
- Reviewing and analysing research results
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional underwriting service to brokers and clients
- Ability to ensure quality of underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within company guidelines and standards

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Underwriting Manager Multi-Focus**
Position code:	**FININS.IU.UNMF.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting Manager Multi-Focus**
Position code:	**FININS.IU.UNMF.5**
Level:	**5**

Responsible for

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Senior Underwriter Multi-Focus**
Position code:	**FININS.IU.UNMF.4**
Level:	**4**

Responsible for

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriter Multi-Focus**
Position code:	**FININS.IU.UNMF.3**
Level:	**3**

Responsible for

Underwriting all new and existing classes of business within set Underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager.

Supervises

Main activities

- Underwriting new and existing business.
- Ensuring quality of Underwriting activities is within limitations of organisation policy and in accordance with Underwriting standards.
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio.
- Identifying need for review of proposal assessments.
- Monitoring and reviewing Underwriting standards procedures and checklists.
- Identifying Underwriting requirements to meet business needs.
- Reviewing and analysing research results.
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation.
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional Underwriting service to brokers and clients.
- Ability to ensure quality of Underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within organisation guidelines and standards.

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**Assistant Underwriter Multi-Focus**
Position code:	**FININS.IU.UNMF.2**
Level:	**2**

Responsible for

Acting in a administrative support capacity for a team of underwriters. Performing varied functions.

Report to

Underwriting Manager, General Administration Manager, Accounts Manager, Branch Manager

Supervises

No reports

Main activities

- Supporting a group of staff within an underwriting department, following and actioning priority of assigned work.
- May assist with accounts payable, accounts receivable, ledgers, import/export transactions. Other general administrative duites including data entry for example
- Maintaining and updating databases and records..
- Cashiering and banking, carrying out foreign exchange transactions and insurance claims.
- Ensuring satisfactory completion of all necessary documentation before final processing.
- Drafting of correspondence as required.
- Collating reports and statistical information and creating PowerPoint presentations within area of assigned activity.

Key skills

- Excellent interpersonal and communication skills.
- Advanced MS Office skills.
- Ability to prioritise individual work load with that of the Team.
- Developing supervisory skills.
- Ability to work in a team environment.

Internal contacts

staff at all Levels, Internal Auditors.

External contacts

Suppliers of Business Equipment, Customers and Clients, External Auditors.

Typical experience

At least 5 years applicable experience in a specific functional area. High school qualifications or equivalent with course work in business curriculum.

Other comments

Alternative Titles: Senior Accounts Clerk, Administration Supervisor.

Position Description

Position title:	**Underwriting - Combined - Level 6**
Position code:	**FININS.IU.UN00.6**
Level:	**6**

Responsible for
Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to
General Manager - Sales, Underwriting Executive.

Supervises
Underwriting Managers, Underwriters.

Main activities
- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills
- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts
Direct and Intermediary Sales Management, Underwriting teams

External contacts
Brokers and Insurance Industry bodies

Typical experience
Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Underwriting - Combined - Level 5**
Position code:	**FININS.IU.UN00.5**
Level:	**5**

Responsible for

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Underwriting - Combined - Level 4**
Position code:	**FININS.IU.UN00.4**
Level:	**4**

Responsible for

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriting - Combined - Level 3**
Position code:	**FININS.IU.UN00.3**
Level:	**3**

Responsible for

Underwriting all new and existing classes of business within set underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager

Supervises

Main activities

- Underwriting new and existing business
- Ensuring quality of underwriting activities is within limitations of company policy and in accordance with underwriting standards
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing underwriting guidelines
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio
- Identifying need for review of proposal assessments
- Monitoring and reviewing underwriting standards procedures and checklists.
- Identifying underwriting requirements to meet business needs.
- Reviewing and analysing research results
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional underwriting service to brokers and clients
- Ability to ensure quality of underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within company guidelines and standards

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**Underwriting - Combined - Level 2**
Position code:	**FININS.IU.UN00.2**
Level:	**2**

Responsible for

Acting in a administrative support capacity for a team of underwriters. Performing varied functions.

Report to

Underwriting Manager, General Administration Manager, Accounts Manager, Branch Manager

Supervises

No supervisory responsibilities.

Main activities

- Supporting a group of staff within an underwriting department, following and actioning priority of assigned work.
- May assist with accounts payable, accounts receivable, ledgers, import/export transactions.
- Other general administrative duties including data entry for example. Maintaining and updating databases and records.
- Cashiering and banking, carrying out foreign exchange transactions and insurance claims.
- Ensuring satisfactory completion of all necessary documentation before final processing.
- Drafting of correspondence as required.
- Collating reports and statistical information and creating PowerPoint presentations within area of assigned activity.

Key skills

- Excellent interpersonal and communication skills.
- Advanced MS Office skills.
- Ability to prioritise individual work load with that of the Team.
- Developing supervisory skills.
- Ability to work in a team environment.

Internal contacts

Staff at all Levels, Internal Auditors.

External contacts

Suppliers of Business Equipment, Customers and Clients, External Auditors.

Typical experience

At least 5 years applicable experience in a specific functional area. High school qualifications or equivalent with course work in business curriculum.

Other comments

Position Description

Position title:	**Risk Engineering - Combined - Level 6**
Position code:	**FININS.IU.RK00.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Risk Engineering - Combined - Level 5**
Position code:	**FININS.IU.RK00.5**
Level:	**5**

Responsible for

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Risk Engineering - Combined - Level 4**
Position code:	**FININS.IU.RK00.4**
Level:	**4**

Responsible for

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**National Reinsurance Underwriting Manager - Facultative**
Position code:	**FININS.IU.FAMF.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Reinsurance Underwriting Manager - Facultative**
Position code:	**FININS.IU.FAMF.5**
Level:	**5**

Responsible for
Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to
State Manager/Operations Manager.

Supervises
Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities
- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills
- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience
Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Reinsurance Underwriting Team Leader Multi-Focus**
Position code:	**FININS.IU.FAMF.4**
Level:	**4**

Responsible for

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Reinsurance Underwriter - Facultative**
Position code:	**FININS.IU.FAMF.3**
Level:	**3**

Responsible for

Underwriting all new and existing classes of business within set underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager

Supervises

Main activities

- Underwriting new and existing business
- Ensuring quality of underwriting activities is within limitations of company policy and in accordance with underwriting standards
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing underwriting guidelines
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio
- Identifying need for review of proposal assessments
- Monitoring and reviewing underwriting standards procedures and checklists.
- Identifying underwriting requirements to meet business needs.
- Reviewing and analysing research results
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional underwriting service to brokers and clients
- Ability to ensure quality of underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within company guidelines and standards

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Reinsurance Underwriting Manager - Treaty**
Position code:	**FININS.IU.TRMF.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Reinsurance Underwriting Manager - Treaty**
Position code:	**FININS.IU.TRMF.5**
Level:	**5**

Responsible for

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Reinsurance Underwriting Team Leader - Treaty**
Position code:	**FININS.IU.TRMF.4**
Level:	**4**

Responsible for
Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to
Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises
Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities
- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills
- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience
Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Reinsurance Underwriter - Treaty**
Position code:	**FININS.IU.TRMF.3**
Level:	**3**

Responsible for

Underwriting all new and existing classes of business within set underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager

Supervises

Main activities

- Underwriting new and existing business
- Ensuring quality of underwriting activities is within limitations of company policy and in accordance with underwriting standards
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing underwriting guidelines
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio
- Identifying need for review of proposal assessments
- Monitoring and reviewing underwriting standards procedures and checklists.
- Identifying underwriting requirements to meet business needs.
- Reviewing and analysing research results
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional underwriting service to brokers and clients
- Ability to ensure quality of underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within company guidelines and standards

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Reinsurance Underwriting Manager - Multi-Area**
Position code:	**FININS.IU.MAMF.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Reinsurance Underwriting Manager - Multi-Area**
Position code:	**FININS.IU.MAMF.5**
Level:	**5**

Responsible for

Managing the development and Underwriting of specified classes to achieve premium growth and profitability within guidelines.

Report to

State Manager/Operations Manager.

Supervises

Senior Underwriter, Underwriter, Assistant Underwriter.

Main activities

- Achieving planned Underwriting results for new and existing business.
- Providing professional Underwriting practice and service to intermediaries.
- Developing the technical expertise of all Underwriting staff and effectively managing staff and their performance.
- Establishing budgets and maintaining credit control of business.
- Identifying need for review of proposal assessment.
- Identifying Underwriting requirements to meet business needs.
- Reviewing variations from proposal assessments.
- Establishing guidelines, plans and priorities for monitoring and approving Underwriting standards.

Key skills

- Full knowledge of company guidelines, Underwriting acceptance levels and systems.
- Ability to provide training plan, career path planning and leadership to all staff.
- Ability to provide professional level of service to intermediaries and to ensure department provides quality service to relevant client groups.
- Ability to define characteristics of Underwriting with current approaches.
- Flexible approach and dedication to duties.
- In-depth knowledge of Underwriting and organisation infrastructure.

Internal contacts

External contacts

Typical experience

Minimum 10 years relevant insurance experience coupled with fellowship or equivalent.

Other comments

Position Description

Position title:	**Reinsurance Underwriting Team Leader - Multi-Area**
Position code:	**FININS.IU.MAMF.4**
Level:	**4**

Responsible for

Efficiently and effectively handling complex Underwriting enquires to maintain strict Underwriting standards and processes within authority limits.

Report to

Underwriting Manager/Assistant Branch Manager/Branch Manager.

Supervises

Underwriting activities for up to 5 staff. Underwriter, Assistant Underwriter.

Main activities

- Underwriting complex risks that fall within defined limits of authority.
- Assisting in the development of Underwriting standards and conducting audits on Underwriting files to ensure standards are maintained.
- Achieving planned Underwriting results for new and existing business and identifying Underwriting requirements to meet business needs.
- Protecting organisations risk exposure by applying retention limits, arranging reinsurance and observing Underwriting guidelines.
- Monitoring and reviewing Underwriting standards, procedures and checklists.
- Reviewing and analysing research results.
- Reviewing variations from usual proposal standards.
- Monitoring reinsurance carried out by other staff and ensuring that all procedures are adhered to.
- Performing supervision for Underwriting activities and responsible for the execution and completion of activities performed by other staff.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation and of all product lines.
- Ability to provide professional level of service to intermediaries and brokers and to support all use of Underwriting by others.
- Ability to find possible solutions to complex Underwriting problems, within defined guidelines.
- In-depth knowledge of Underwriting and excellent knowledge of the organisation structure and interrelationships.

Internal contacts

External contacts

Typical experience

Minimum 5-8 years insurance experience. Relevant insurance qualifications through a fellowship/associateship or equivalent.

Other comments

Position Description

Position title:	**Reinsurance Underwriter - Multi-Area**
Position code:	**FININS.IU.MAMF.3**
Level:	**3**

Responsible for

Underwriting all new and existing classes of business within set underwriting guidelines, authority levels and service standards.

Report to

Underwriting Manager or Senior Underwriter, Assistant Branch Manager or Branch Manager

Supervises

Main activities

- Underwriting new and existing business
- Ensuring quality of underwriting activities is within limitations of company policy and in accordance with underwriting standards
- Protecting company risk exposure by applying retention limits, arranging reinsurance and observing underwriting guidelines
- Preparing reports on portfolio performance and maintaining credit control of business within the portfolio
- Identifying need for review of proposal assessments
- Monitoring and reviewing underwriting standards procedures and checklists.
- Identifying underwriting requirements to meet business needs.
- Reviewing and analysing research results
- Ensuring all documentation is accurate and complete and conforms with organisational guidelines.

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels, systems and any relevant legislation.
- Understanding of instalment system and account reconciliation
- Ability to provide training and leadership to Assistant Underwriters and take responsibility for the execution and completion for activities performed by other staff.
- Ability to provide efficient and timely service and professional underwriting service to brokers and clients
- Ability to ensure quality of underwriting activities is within limitations and authority levels and to accept or reject risks or alterations within company guidelines and standards

Internal contacts

External contacts

Typical experience

Minimum 2-3 years of underwriting experience. Relevant insurance qualifications through a associateship or equivalent.

Other comments

Position Description

Position title:	**National Loss Control/Risk Engineering Manager Commercial Lines**
Position code:	**FININS.IU.RKCL.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Loss Control/Risk Engineering Manager Commercial Lines**
Position code:	**FININS.IU.RKCL.5**
Level:	**5**

Responsible for
Producing risk assessment surveys and providing risk management advice for Industrial Special Risks/Machinery and/or Casualty classes of business.

Report to
General Manager, National Assessing Manager.

Supervises
Loss Control/Risk Officers.

Main activities
- Producing risk assessment reports and, as appropriate, risk improvement recommendations.
- Ensuring completed reports are delivered with adequate underwriting information so as to facilitate risk understanding by Underwriters leading to an acceptable loss ratio.
- Reviewing reports prepared by third party bodies and interpreting those reports to enable an accurate risk assessment to be completed with results relayed to Underwriters and Business Managers as required.
- Assessing and evaluating operational policies and procedures to achieve the identified risk management objectives and recommend enhancements where necessary.
- Introducing new technology and enhanced risk management techniques and approaches to assist risk identification, measurement and control.
- Monitoring the progress of risk management process on existing and new projects/activities undertaken by the Organisation.
- Ensuring that internal Underwriting Staff and Loss Control Surveyors receive adequate training in risk assessment and technical issues.
- Ensuring operating policies and procedures are followed and activities are conducted ethically.
- Serving as a reference point to Managers on risk management issues.

Key skills
- Strong communication and analytical skills.
- Knowledge and experience of undertaking risk reports of large and complex risks.
- Business planning, budgeting and change management skills.

Internal contacts
Management, Loss Control/Risk Officers, Underwriters.

External contacts
Group and Agency Representatives on issues affecting the Organisation. Government and Independent Agencies on issues affecting product development.

Typical experience
At least 7 years experience within a Loss Control/Management capacity, together with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Loss Control/Risk Engineer Commercial Lines**
Position code:	**FININS.IU.RKCL.4**
Level:	**4**

Responsible for

Physically inspecting risks proposed and furnishing written reports to enable Underwriters to make informed acceptance decisions.

Report to

Loss Control/Risk Manager.

Supervises

No supervisory responsibilities.

Main activities

- Inspecting highly valued and/or complex risk identifying physical and moral hazards.
- Completing relevant reports including photographic and other reporting documentation in a format and timeframe as required.
- Monitoring and reporting on the implementation of actions for risk improvement and ensuring results are relayed to Underwriters.
- Making recommendations on acceptability, risk improvement and hazard reduction.
- Posting claims inspections addressing specific concerns.
- Conducting training of appropriate personnel on loss control including property security, intruder detection and prevention, fire prevention and safety related issues.
- Continually enhancing and disseminating technical information related to loss control.
- Keeping abreast of new developments in loss control methods and technology.

Key skills

- Working knowledge of underwriting survey requirements for insurance rating.
- Highly skilled in risk identification and loss prevention advice.
- Good verbal and written communication skills.
- Strong analytical skills.

Internal contacts

Underwriting department.

External contacts

Clients, Agency Representatives.

Typical experience

At least 3-4 years practical surveying experience together with technical qualifications.

Other comments

Position Description

Position title:	**National Loss Control/Risk Engineering Manager Personal Lines**
Position code:	**FININS.IU.RKPL.6**
Level:	**6**

Responsible for

Managing a team of underwriters to assist the sales force and intermediaries to write and maintain a profitable book of business at a national level.

Report to

General Manager - Sales, Underwriting Executive.

Supervises

Underwriting Managers, Underwriters.

Main activities

- Achieving planned underwriting results for new and existing business
- Providing professional underwriting practice and service to Sales staff and/or intermediaries
- Developing the technical expertise of all underwriting staff and acting as a referral point in technical underwriting issues across area of responsibility
- Maintaining credit control of business
- Implementing and maintaining risk control, underwriting and systems and procedures across area of responsibility
- Managing the risk acceptance process so that business is written within delegation of authority and within company's underwriting philosophy
- Establishing guidelines, plans and priorities for monitoring and approval of underwriting standards
- Ensuring quality of underwriting activity is within limitations of company policy
- Initially determining potential value of proposals profitability

Key skills

- Full knowledge of company guidelines, underwriting acceptance levels and systems and in depth knowledge of company infrastructure
- Ability to provide training plan, career path planning and leadership to all staff
- Ability to conduct presentations to managers and User groups
- In depth knowledge of underwriting and understanding of relevant legislation.
- Ability to establish budgets, manage expenses to budget and to develop management plan of portfolio
- Ability to plan complex activities involving coordination of activities with other departments

Internal contacts

Direct and Intermediary Sales Management, Underwriting teams

External contacts

Brokers and Insurance Industry bodies

Typical experience

Minimum 10 years of relevant insurance experience and relevant tertiary or specialist qualifications

Other comments

Position Description

Position title:	**Loss Control/Risk Engineering Manager Personal Lines**
Position code:	**FININS.IU.RKPL.5**
Level:	**5**

Responsible for
Producing risk assessment surveys and providing risk management advice for Industrial Special Risks/Machinery and/or Casualty classes of business.

Report to
General Manager, National Assessing Manager.

Supervises
Loss Control/Risk Officers.

Main activities
- Producing risk assessment reports and, as appropriate, risk improvement recommendations.
- Ensuring completed reports are delivered with adequate underwriting information so as to facilitate risk understanding by Underwriters leading to an acceptable loss ratio.
- Reviewing reports prepared by third party bodies and interpreting those reports to enable an accurate risk assessment to be completed with results relayed to Underwriters and Business Managers as required.
- Assessing and evaluating operational policies and procedures to achieve the identified risk management objectives and recommend enhancements where necessary.
- Introducing new technology and enhanced risk management techniques and approaches to assist risk identification, measurement and control.
- Monitoring the progress of risk management process on existing and new projects/activities undertaken by the Organisation.
- Ensuring that internal Underwriting Staff and Loss Control Surveyors receive adequate training in risk assessment and technical issues.
- Ensuring operating policies and procedures are followed and activities are conducted ethically.
- Serving as a reference point to Managers on risk management issues.

Key skills
- Strong communication and analytical skills.
- Knowledge and experience of undertaking risk reports of large and complex risks.
- Business planning, budgeting and change management skills.

Internal contacts
Management, Loss Control/Risk Officers, Underwriters.

External contacts
Group and Agency Representatives on issues affecting the Organisation. Government and Independent Agencies on issues affecting product development.

Typical experience
At least 7 years experience within a Loss Control/Management capacity, together with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Loss Control/Risk Engineer Personal Lines**
Position code:	**FININS.IU.RKPL.4**
Level:	**4**

Responsible for

Physically inspecting risks proposed and furnishing written reports to enable Underwriters to make informed acceptance decisions.

Report to

Loss Control/Risk Manager.

Supervises

No supervisory responsibilities.

Main activities

- Inspecting highly valued and/or complex risk identifying physical and moral hazards.
- Completing relevant reports including photographic and other reporting documentation in a format and timeframe as required.
- Monitoring and reporting on the implementation of actions for risk improvement and ensuring results are relayed to Underwriters.
- Making recommendations on acceptability, risk improvement and hazard reduction.
- Posting claims inspections addressing specific concerns.
- Conducting training of appropriate personnel on loss control including property security, intruder detection and prevention, fire prevention and safety related issues.
- Continually enhancing and disseminating technical information related to loss control.
- Keeping abreast of new developments in loss control methods and technology.

Key skills

- Working knowledge of underwriting survey requirements for insurance rating.
- Highly skilled in risk identification and loss prevention advice.
- Good verbal and written communication skills.
- Strong analytical skills.

Internal contacts

Underwriting department.

External contacts

Clients, Agency Representatives.

Typical experience

At least 3-4 years practical surveying experience together with technical qualifications.

Other comments

Position Description

Position title:	**National Loss Control/Risk Engineering Manager Multi-focus**
Position code:	**FININS.IU.RKMF.6**
Level:	**6**

Responsible for

Establishing, monitoring and controlling the Loss Control/Risk Management function of the organisation, including producing risk assessment surveys and providing risk management advice for Industrial Special Risks/Machinery and/or Casualty classes of business.

Report to

Chief Executive Officer, General Manager.

Supervises

Loss Control/Risk Managers.

Main activities

- Producing and monitoring risk assessment reports, undertaking Risk identification analysis and ensuring rectification of Risk areas.
- Providing direction and advice on a broad range of Risk Management issues.
- Undertaking Risk improvement strategies through the continual development of improved Risk reporting, Risk identification and follow-up procedures and systems.
- Ensuring the Risk improvement recommendations are submitted to the intermediary and the insured. Ensuring recommendations are followed up/monitored until an acceptable Risk improvement outcome is achieved.
- Ensuring that internal Underwriting Staff and Loss Control Surveyors receive adequate training in Risk assessment and technical issues.
- Monitoring the performance of Loss Control/Risk Management Staff.
- Ensuring operating policies and procedures are followed and activities are conducted ethically.

Key skills

- Exceptional communication, negotiation and analytical skills.
- Knowledge and experience of undertaking Risk reports of large and complex Risks.
- Business planning, budgeting and change management skills.

Internal contacts

Loss Control/Risk Management, Underwriters.

External contacts

Group and agency representatives on issues affecting the business. Government and independent agencies on issues affecting product development.

Typical experience

Minimum 15 years experience in Loss Control/Risk Management and extensive experience in conducting Risk identification and Risk remediation. Relevant tertiary or specialist qualifications.

Other comments

Position Description

Position title:	**Loss Control/Risk Engineering Manager Multi-focus**
Position code:	**FININS.IU.RKMF.5**
Level:	**5**

Responsible for

Producing risk assessment surveys and providing risk management advice for Industrial Special Risks/Machinery and/or Casualty classes of business.

Report to

General Manager, National Assessing Manager.

Supervises

Loss Control/Risk Officers.

Main activities

- Producing risk assessment reports and, as appropriate, risk improvement recommendations.
- Ensuring completed reports are delivered with adequate underwriting information so as to facilitate risk understanding by Underwriters leading to an acceptable loss ratio.
- Reviewing reports prepared by third party bodies and interpreting those reports to enable an accurate risk assessment to be completed with results relayed to Underwriters and Business Managers as required.
- Assessing and evaluating operational policies and procedures to achieve the identified risk management objectives and recommend enhancements where necessary.
- Introducing new technology and enhanced risk management techniques and approaches to assist risk identification, measurement and control.
- Monitoring the progress of risk management process on existing and new projects/activities undertaken by the Organisation.
- Ensuring that internal Underwriting Staff and Loss Control Surveyors receive adequate training in risk assessment and technical issues.
- Ensuring operating policies and procedures are followed and activities are conducted ethically.
- Serving as a reference point to Managers on risk management issues.

Key skills

- Strong communication and analytical skills.
- Knowledge and experience of undertaking risk reports of large and complex risks.
- Business planning, budgeting and change management skills.

Internal contacts

Management, Loss Control/Risk Officers, Underwriters.

External contacts

Group and Agency Representatives on issues affecting the Organisation. Government and Independent Agencies on issues affecting product development.

Typical experience

At least 7 years experience within a Loss Control/Management capacity, together with relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Loss Control/Risk Engineer Multi-focus**
Position code:	**FININS.IU.RKMF.4**
Level:	**4**

Responsible for

Physically inspecting risks proposed and furnishing written reports to enable Underwriters to make informed acceptance decisions.

Report to

Loss Control/Risk Manager.

Supervises

No supervisory responsibilities.

Main activities

- Inspecting highly valued and/or complex risk identifying physical and moral hazards.
- Completing relevant reports including photographic and other reporting documentation in a format and timeframe as required.
- Monitoring and reporting on the implementation of actions for risk improvement and ensuring results are relayed to Underwriters.
- Making recommendations on acceptability, risk improvement and hazard reduction.
- Posting claims inspections addressing specific concerns.
- Conducting training of appropriate personnel on loss control including property security, intruder detection and prevention, fire prevention and safety related issues.
- Continually enhancing and disseminating technical information related to loss control.
- Keeping abreast of new developments in loss control methods and technology.

Key skills

- Working knowledge of underwriting survey requirements for insurance rating.
- Highly skilled in risk identification and loss prevention advice.
- Good verbal and written communication skills.
- Strong analytical skills.

Internal contacts

Underwriting department.

External contacts

Clients, Agency Representatives.

Typical experience

At least 3-4 years practical surveying experience together with technical qualifications.

Other comments

Position Description

Position title:	**Head of Portfolio - Real Estate**
Position code:	**FINASM.PM.REMF.7**
Level:	**7**

Responsible for

Lead the Investment Management Team to manage the organisation/client assets to attain the best profitability and investment returns.. .Overall accountability for the total portfolio outcome and growth.

Report to

Chief Executive Officer or Chief Operating Officer

Supervises

Investment Managers, Portfolio Managers, Economists

Main activities

- Leadership of Investment Management Department.
- Determining and maintaining an effective funds management plan, philosophy and guidelines for the organisation/clients.
- Preparing and communicating investment plans, targets and forecasts to management.
- Determining and maintaining effective operating procedures for managing funds within the organisation.
- Managing the professional development of employees within business unit.
- Participating as a senior member of an Investment Committee to work towards the most profitable management of funds.
- Investigating new opportunities/areas of operation within the market to improve generation of investment income.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Investment/Fund managers, Economists, Senior Management.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 12-15 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Position Description

Position title:	**Senior Portfolio Manager - Real Estate**
Position code:	**FINASM.PM.REMF.6**
Level:	**6**

Responsible for

Managing a significant fund or a portfolio of funds on behalf of the organisation/client.

Report to

General Manager/Head of Investment Management

Supervises

May supervise more junior staff

Main activities

- Making decisions for allocated funds, within predetermined strategic guidelines and authority limits.
- Contributing to broader departmental decision-making on investment strategies and recommending specific policies for area of specialisation.
- Providing guidance, coaching and advice to more junior fund managers/analysts.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Good people management skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Other Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 10 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Position Description

Position title:	**Portfolio Manager - Real Estate**
Position code:	**FINASM.PM.REMF.5**
Level:	**5**

Responsible for

Managing a portfolio of smaller funds on behalf of the organisation/client.

Report to

General Manager/Head of Investment Management or Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Making decisions for allocated funds, within predetermined strategic guidelines and authority limits.
- Contributing to departmental decision-making on investment policies for area of specialisation.
- Providing guidance, coaching and advice to analysts.

Key skills

- Excellent communication skills, both written and verbal.
- Strategic planning skills.
- Good interpersonal skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Other Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 7 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Position Description

Position title:	**Senior Analyst - Real Estate**
Position code:	**FINASM.PM.REMF.4**
Level:	**4**

Responsible for

Providing quantitative Research and information to facilitate informed investment decisions.

Report to

Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated geographic or industry sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Typical experience

3-4+ years commercial experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title:	**Analyst - Real Estate**
Position code:	**FINASM.PM.REMF.3**
Level:	**3**

Responsible for

Providing quantitative Research and Information to assist in the management of investments on behalf of the organisation

Report to

Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Advising Fund Managers on most appropriate investment decisions based on quantitative analyses.
- Planning and generating Analysis and Research specific to a designated geographic or industry sector.
- Developing and utilising predictive mathematical and financial models of designated market segments.
- Contributing to risk analyses and suggested investment strategies as required.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Good interpersonal skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 4-5 years of funds management experience. Tertiary qualifications in business or finance, may be studying for post-graduate level.

Other comments

Position Description

Position title:	**Investment Support - Real Estate**
Position code:	**FINASM.PM.REMF.2**
Level:	**2**

Responsible for

Conducting a variety of daily activities within the Investment Management Team.

Report to

Team Leader - Operations, Investment Management

Supervises

No Supervisory Responsibilities.

Main activities

- Conducting various functions/processes within the Investment Management Department such as clearance, futures settlements, equities processing, options clearance, orders processing, data entry, reconciliations, trade input and verification.
- Resolving problems as they arise and referring complex issues to more senior staff.
- Assisting with the investigation of unreconciled items and failed trades.

Key skills

- Developing knowledge and understanding of the functions and processes within the Operations area.
- Sound working knowledge of relevant technologies and software.

Internal contacts

Investment Specialists/Dealers, Finance and Administration Staff.

External contacts

Trade/External Associations, Regulatory Bodies.

Typical experience

Minimum 12-18 months relevant industry experience and may have tertiary qualifications in Accounting, Finance or similar. May also have SIA qualifications.

Other comments

Position Description

Position title:	**Head of Portfolio - Equities**
Position code:	**FINASM.PM.EQMF.7**
Level:	**7**

Responsible for

Lead the Investment Management Team to manage the organisation/client assets to attain the best profitability and investment returns.. .Overall accountability for the total portfolio outcome and growth.

Report to

Chief Executive Officer or Chief Operating Officer

Supervises

Investment Managers, Portfolio Managers, Economists

Main activities

- Leadership of Investment Management Department.
- Determining and maintaining an effective funds management plan, philosophy and guidelines for the organisation/clients.
- Preparing and communicating investment plans, targets and forecasts to management.
- Determining and maintaining effective operating procedures for managing funds within the organisation.
- Managing the professional development of employees within business unit.
- Participating as a senior member of an Investment Committee to work towards the most profitable management of funds.
- Investigating new opportunities/areas of operation within the market to improve generation of investment income.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Investment/Fund managers, Economists, Senior Management.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 12-15 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Position Description

Position title:	**Senior Portfolio Manager - Equities**
Position code:	**FINASM.PM.EQMF.6**
Level:	**6**

Responsible for

Managing a significant fund or a portfolio of funds on behalf of the organisation/client.

Report to

General Manager/Head of Investment Management

Supervises

May supervise more junior staff

Main activities

- Making decisions for allocated funds, within predetermined strategic guidelines and authority limits.
- Contributing to broader departmental decision-making on investment strategies and recommending specific policies for area of specialisation.
- Providing guidance, coaching and advice to more junior fund managers/analysts.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Good people management skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Other Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 10 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Position Description

Position title:	**Portfolio Manager - Equities**
Position code:	**FINASM.PM.EQMF.5**
Level:	**5**

Responsible for

Managing a portfolio of smaller funds on behalf of the organisation/client.

Report to

General Manager/Head of Investment Management or Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Making decisions for allocated funds, within predetermined strategic guidelines and authority limits.
- Contributing to departmental decision-making on investment policies for area of specialisation.
- Providing guidance, coaching and advice to analysts.

Key skills

- Excellent communication skills, both written and verbal.
- Strategic planning skills.
- Good interpersonal skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Other Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 7 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Position Description

Position title:	**Senior Analyst - Equities**
Position code:	**FINASM.PM.EQMF.4**
Level:	**4**

Responsible for

Providing quantitative Research and information to facilitate informed investment decisions.

Report to

Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated geographic or industry sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Typical experience

3-4+ years commercial experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title:	**Analyst - Equities**
Position code:	**FINASM.PM.EQMF.3**
Level:	**3**

Responsible for

Providing quantitative Research and Information to assist in the management of investments on behalf of the organisation

Report to

Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Advising Fund Managers on most appropriate investment decisions based on quantitative analyses.
- Planning and generating Analysis and Research specific to a designated geographic or industry sector.
- Developing and utilising predictive mathematical and financial models of designated market segments.
- Contributing to risk analyses and suggested investment strategies as required.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Good interpersonal skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 4-5 years of funds management experience. Tertiary qualifications in business or finance, may be studying for post-graduate level.

Other comments

Position Description

Position title:	**Investment Support - Equities**
Position code:	**FINASM.PM.EQMF.2**
Level:	**2**

Responsible for

Conducting a variety of daily activities within the Investment Management Team.

Report to

Team Leader - Operations, Investment Management

Supervises

No Supervisory Responsibilities.

Main activities

- Conducting various functions/processes within the Investment Management Department such as clearance, futures settlements, equities processing, options clearance, orders processing, data entry, reconciliations, trade input and verification.
- Resolving problems as they arise and referring complex issues to more senior staff.
- Assisting with the investigation of unreconciled items and failed trades.

Key skills

- Developing knowledge and understanding of the functions and processes within the Operations area.
- Sound working knowledge of relevant technologies and software.

Internal contacts

Investment Specialists/Dealers, Finance and Administration Staff.

External contacts

Trade/External Associations, Regulatory Bodies.

Typical experience

Minimum 12-18 months relevant industry experience and may have tertiary qualifications in Accounting, Finance or similar. May also have SIA qualifications.

Other comments

Position Description

Position title:	**Head of Portfolio - Fixed Income**
Position code:	**FINASM.PM.FIMF.7**
Level:	**7**

Responsible for

Lead the Investment Management Team to manage the organisation/client assets to attain the best profitability and investment returns.. .Overall accountability for the total portfolio outcome and growth.

Report to

Chief Executive Officer or Chief Operating Officer

Supervises

Investment Managers, Portfolio Managers, Economists

Main activities

- Leadership of Investment Management Department.
- Determining and maintaining an effective funds management plan, philosophy and guidelines for the organisation/clients.
- Preparing and communicating investment plans, targets and forecasts to management.
- Determining and maintaining effective operating procedures for managing funds within the organisation.
- Managing the professional development of employees within business unit.
- Participating as a senior member of an Investment Committee to work towards the most profitable management of funds.
- Investigating new opportunities/areas of operation within the market to improve generation of investment income.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Investment/Fund managers, Economists, Senior Management.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 12-15 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Position Description

Position title:	**Senior Portfolio Manager - Fixed Income**
Position code:	**FINASM.PM.FIMF.6**
Level:	**6**

Responsible for

Managing a significant fund or a portfolio of funds on behalf of the organisation/client.

Report to

General Manager/Head of Investment Management

Supervises

May supervise more junior staff

Main activities

- Making decisions for allocated funds, within predetermined strategic guidelines and authority limits.
- Contributing to broader departmental decision-making on investment strategies and recommending specific policies for area of specialisation.
- Providing guidance, coaching and advice to more junior fund managers/analysts.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Good people management skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Other Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 10 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Position Description

Position title:	**Portfolio Manager - Fixed Income**
Position code:	**FINASM.PM.FIMF.5**
Level:	**5**

Responsible for

Managing a portfolio of smaller funds on behalf of the organisation/client.

Report to

General Manager/Head of Investment Management or Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Making decisions for allocated funds, within predetermined strategic guidelines and authority limits.
- Contributing to departmental decision-making on investment policies for area of specialisation.
- Providing guidance, coaching and advice to analysts.

Key skills

- Excellent communication skills, both written and verbal.
- Strategic planning skills.
- Good interpersonal skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Other Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 7 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Position Description

Position title:	**Senior Analyst - Fixed Income**
Position code:	**FINASM.PM.FIMF.4**
Level:	**4**

Responsible for

Providing quantitative Research and information to facilitate informed investment decisions.

Report to

Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated geographic or industry sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Typical experience

3-4+ years commercial experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title:	**Analyst - Fixed Income**
Position code:	**FINASM.PM.FIMF.3**
Level:	**3**

Responsible for

Providing quantitative Research and Information to assist in the management of investments on behalf of the organisation

Report to

Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Advising Fund Managers on most appropriate investment decisions based on quantitative analyses.
- Planning and generating Analysis and Research specific to a designated geographic or industry sector.
- Developing and utilising predictive mathematical and financial models of designated market segments.
- Contributing to risk analyses and suggested investment strategies as required.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Good interpersonal skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 4-5 years of funds management experience. Tertiary qualifications in business or finance, may be studying for post-graduate level.

Other comments

Position Description

Position title:	**Investment Support - Fixed Income**
Position code:	**FINASM.PM.FIMF.2**
Level:	**2**

Responsible for

Conducting a variety of daily activities within the Investment Management Team.

Report to

Team Leader - Operations, Investment Management

Supervises

No Supervisory Responsibilities.

Main activities

- Conducting various functions/processes within the Investment Management Department such as clearance, futures settlements, equities processing, options clearance, orders processing, data entry, reconciliations, trade input and verification.
- Resolving problems as they arise and referring complex issues to more senior staff.
- Assisting with the investigation of unreconciled items and failed trades.

Key skills

- Developing knowledge and understanding of the functions and processes within the Operations area.
- Sound working knowledge of relevant technologies and software.

Internal contacts

Investment Specialists/Dealers, Finance and Administration Staff.

External contacts

Trade/External Associations, Regulatory Bodies.

Typical experience

Minimum 12-18 months relevant industry experience and may have tertiary qualifications in Accounting, Finance or similar. May also have SIA qualifications.

Other comments

Position Description

Position title:	**Head of Portfolio - Multi -Asset**
Position code:	**FINASM.PM.MUMF.7**
Level:	**7**

Responsible for

Lead the Investment Management Team to manage the organisation/client assets to attain the best profitability and investment returns.. .Overall accountability for the total portfolio outcome and growth.

Report to

Chief Executive Officer or Chief Operating Officer

Supervises

Investment Managers, Portfolio Managers, Economists

Main activities

- Leadership of Investment Management Department.
- Determining and maintaining an effective funds management plan, philosophy and guidelines for the organisation/clients.
- Preparing and communicating investment plans, targets and forecasts to management.
- Determining and maintaining effective operating procedures for managing funds within the organisation.
- Managing the professional development of employees within business unit.
- Participating as a senior member of an Investment Committee to work towards the most profitable management of funds.
- Investigating new opportunities/areas of operation within the market to improve generation of investment income.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Investment/Fund managers, Economists, Senior Management.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 12-15 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Alternative Titles: Chief Investment Officer, General Manager - Funds Management.

Position Description

Position title:	**Senior Portfolio Manager - Multi-Asset**
Position code:	**FINASM.PM.MUMF.6**
Level:	**6**

Responsible for

Managing a significant fund or a portfolio of funds on behalf of the organisation/client.

Report to

General Manager/Head of Investment Management

Supervises

May supervise more junior staff

Main activities

- Making decisions for allocated funds, within predetermined strategic guidelines and authority limits.
- Contributing to broader departmental decision-making on investment strategies and recommending specific policies for area of specialisation.
- Providing guidance, coaching and advice to more junior fund managers/analysts.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Good people management skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Other Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 10 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Alternative Titles: Senior Investment Manager

Position Description

Position title:	**Portfolio Manager - Multi-Asset**
Position code:	**FINASM.PM.MUMF.5**
Level:	**5**

Responsible for

Managing a portfolio of smaller funds on behalf of the organisation/client.

Report to

General Manager/Head of Investment Management or Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Making decisions for allocated funds, within predetermined strategic guidelines and authority limits.
- Contributing to departmental decision-making on investment policies for area of specialisation.
- Providing guidance, coaching and advice to analysts.

Key skills

- Excellent communication skills, both written and verbal.
- Strategic planning skills.
- Good interpersonal skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Other Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 7 years of funds management experience. Tertiary qualifications in business or finance, often to post-graduate level.

Other comments

Alternative Titles: Investment Manager

Position Description

Position title:	**Senior Analyst - Multi-Asset**
Position code:	**FINASM.PM.MUMF.4**
Level:	**4**

Responsible for

Providing quantitative Research and information to facilitate informed investment decisions.

Report to

Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated geographic or industry sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Typical experience

3-4+ years commercial experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title:	**Analyst - Multi-Asset**
Position code:	**FINASM.PM.MUMF.3**
Level:	**3**

Responsible for

Providing quantitative Research and Information to assist in the management of investments on behalf of the organisation

Report to

Senior Portfolio Manager

Supervises

No supervisory responsibilities.

Main activities

- Advising Fund Managers on most appropriate investment decisions based on quantitative analyses.
- Planning and generating Analysis and Research specific to a designated geographic or industry sector.
- Developing and utilising predictive mathematical and financial models of designated market segments.
- Contributing to risk analyses and suggested investment strategies as required.

Key skills

- Excellent communication skills, both written and verbal.
- Strong strategic planning skills.
- Good interpersonal skills.
- Well developed numeric and financial analysis skills.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments.

Typical experience

At least 4-5 years of funds management experience. Tertiary qualifications in business or finance, may be studying for post-graduate level.

Other comments

Position Description

Position title:	**Investment Support - Multi-Asset**
Position code:	**FINASM.PM.MUMF.2**
Level:	**2**

Responsible for

Conducting a variety of daily activities within the Investment Management Team.

Report to

Team Leader - Operations, Investment Management

Supervises

No Supervisory Responsibilities.

Main activities

- Conducting various functions/processes within the Investment Management Department such as clearance, futures settlements, equities processing, options clearance, orders processing, data entry, reconciliations, trade input and verification.
- Resolving problems as they arise and referring complex issues to more senior staff.
- Assisting with the investigation of unreconciled items and failed trades.

Key skills

- Developing knowledge and understanding of the functions and processes within the Operations area.
- Sound working knowledge of relevant technologies and software.

Internal contacts

Investment Specialists/Dealers, Finance and Administration Staff.

External contacts

Trade/External Associations, Regulatory Bodies.

Typical experience

Minimum 12-18 months relevant industry experience and may have tertiary qualifications in Accounting, Finance or similar. May also have SIA qualifications.

Other comments

Position Description

Position title:	**Head of Research**
Position code:	**FINASM.RE.MAMF.7**
Level:	**7**

Responsible for

Leading and directing the research Department's activities in investment design, analysis and delivery of investment reports

Report to

Chief Executive Officer or Chief Operating Officer

Supervises

Investment Research Managers, Team leaders and Analysts

Main activities

- Presenting research submissions to the investment decision-making panel and participating in panel discussions on short term investment policy and the examination of portfolio performance.
- Managing the flow and distribution of local and overseas research material, newspapers and financial magazines to research and other interested staff.
- Evaluating New Zealand industry reviews and reports on overseas economies, stock markets, individual companies and market research submissions.
- Preparing periodic assessment and evaluation of broker's research and recommending action where inconsistency is perceived.
- Assisting and developing with promotional activities including meetings with Securities Industry professionals, press presentations concerning the strategies, performance and expertise of the investment operation, and liaising with general or regular investment publications and news sheets.
- Monitoring research trends and investment fluctuations to aid in the provision of meaningful and accurate research summaries.
- Selecting, developing and appraising the performance of subordinates
- Liaising with brokers and other investment authorities on research matters to monitor current trends, discuss mutual problems and exchange information.

Key skills

- Very strong numeric skills, often from an actuarial background.
- Excellent communication skills, both written and verbal.
- Strong mathematical and financial modelling skills.
- Strong analytical, consulting and persuasion skills.
- Very strong knowledge of funds management and investment markets.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Money market institutions, stock brokers, external economical analysts, various Government departments, external research agencies

Typical experience

10+ years of Research/Funds Management experience coupled with tertiary qualifications to post graduate level in Econometrics, Mathematics or Statistics.

Other comments

Position Description

Position title:	**Senior Research Manager**
Position code:	**FINASM.RE.MAMF.6**
Level:	**6**

Responsible for

Controlling and Coordinating the research Department’s activities in investment analysis and preparing reports and forecasts to assist in investment management decisions.

Report to

Head of Research/ General Manager/Head of Investment Management

Supervises

Research Analysts.

Main activities

- Presenting research submissions to the investment decision-making panel and participating in panel discussions on short term investment policy and the examination of portfolio performance.
- Managing the flow and distribution of local and overseas research material, newspapers and financial magazines to research and other interested staff.
- Evaluating New Zealand industry reviews and reports on overseas economies, stock markets, individual companies and market research submissions.
- Preparing periodic assessment and evaluation of broker’s research and recommending action where inconsistency is perceived.
- Assisting with promotional activities including meetings with Securities Industry professionals, press presentations concerning the strategies, performance and expertise of the investment operation, and liaising with general or regular investment publications and news sheets.
- Monitoring research trends and investment fluctuations to aid in the provision of meaningful and accurate research summaries.
- Selecting, developing and appraising the performance of subordinates
- Liaising with brokers and other investment authorities on research matters to monitor current trends, discuss mutual problems and exchange information.

Key skills

- Very strong numeric skills, often from an actuarial background.
- Good communication skills, both written and verbal.
- Strong mathematical and financial modelling skills.
- Strong analytical, consulting and persuasion skills.
- Good knowledge of funds management and investment markets.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Research Agencies.

Typical experience

6 - 9+ years experience in Research/Funds Management, with solid skills as a Research Analyst coupled with tertiary qualifications in Economics, Finance or Econometrics. May have post graduate qualifications.

Other comments

Position Description

Position title:	**Research Manager**
Position code:	**FINASM.RE.MAMF.5**
Level:	**5**

Responsible for

Planning and managing Research activities for a range of investment markets including equities and fixed interest.

Report to

Head of Research/ General Manager/Head of Investment Management

Supervises

Research Analysts.

Main activities

- Advising fund managers on the most appropriate asset allocation based on quantitative analyses, in line with overall investment strategy signed off by senior management.
- Managing investment Research strategies that facilitate strong investment performance.
- Providing high level reports to Head of Research specific to the relevant markets.
- Determining current and prospective value of investment portfolios.
- Developing and continually improving advanced quantitative analysis techniques.
- Applying expertise to risk management modelling and valuation practices.

Key skills

- Very strong numeric skills, often from an actuarial background.
- Good communication skills, both written and verbal.
- Strong mathematical and financial modelling skills.
- Strong analytical, consulting and persuasion skills.
- Good knowledge of funds management and investment markets.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

Research Agencies.

Typical experience

6 - 9+ years experience in Research/Funds Management, with solid skills as a Research Analyst coupled with tertiary qualifications in Economics, Finance or Econometrics. May have post graduate qualifications.

Other comments

Position Description

Position title:	**Senior Research Analyst**
Position code:	**FINASM.RE.MAMF.4**
Level:	**4**

Responsible for

Providing extensive quantitative Research and information to facilitate informed investment decisions.

Report to

Manager - Investment Analytics

Supervises

May supervise Junior Research Analysts or lead a project team.

Main activities

- Advising Fund Managers on most appropriate asset allocations based on quantitative analyses.
- Planning and generating Analysis and Research specific to a designated geographic or industry sector.
- Developing and utilising predictive mathematical and financial models of designated market segments.
- Contributing to risk analyses and suggested investment strategies as required.

Key skills

- Strong numeracy and statistical abilities.
- Effective communication skills, both written and verbal.
- Strong financial and mathematical modelling skills.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

n/a

Typical experience

4 - 5+ years experience in Research/Funds Management, with solid skills as a Research Analyst coupled with tertiary qualifications in Economics, Finance or Econometrics. May have post graduate qualifications.

Other comments

Position Description

Position title:	**Research Analyst**
Position code:	**FINASM.RE.MAMF.3**
Level:	**3**

Responsible for

Providing quantitative Research and information to facilitate informed investment decisions.

Report to

Manager - Investment Analytics

Supervises

No supervisory responsibilities.

Main activities

- Generating Analysis and Research specific to a designated geographic or industry sector.
- Preparing routine and ad-hoc reports for internal and external clients.
- Delivering research to defined time and content standards.
- Entering and maintaining data in IT systems/databases for broader business utilisation.
- Performing basic data cleansing and manipulation activities.

Key skills

- Strong numeric and statistical abilities.
- Effective communication skills, both written and verbal.
- Understands a range of financial markets research techniques.

Internal contacts

Portfolio/Investment/Fund Managers, Economists.

External contacts

n/a

Typical experience

3-4+ years commercial experience coupled with tertiary qualifications in Economics, Finance or Econometrics. May be studying towards post graduate qualifications.

Other comments

Position Description

Position title:	**Head of Trading - Multi-Asset**
Position code:	**FINASM.TR.MAMF.7**
Level:	**7**

Responsible for

Responsible for investment performance across several major asset classes including setting investment policy

Report to

Chief Executive Officer, CFO

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Senior Manager Trading - Multi-Asset**
Position code:	**FINASM.TR.MAMF.6**
Level:	**6**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Manager Trading - Multi-Asset**
Position code:	**FINASM.TR.MAMF.5**
Level:	**5**

Responsible for

Managing a variety of short-to-long term investment instruments.

Report to

Divisional Manager

Supervises

Traders/Dealers

Main activities

- Formulating strategies for a variety of short-to-long term investment instruments.
- Monitoring market transactions.
- Managing the exchange settlement account and exchange settlement funds.
- Monitoring the organisation's short-to-long term liquidity position and short-to-long term investments.Managing a team through all aspects of recruitment, workplace training, performance assessment and counselling.
- Analysing and reporting frequently on investment performance to budget and strategy.

Key skills

- Managerial ability plus sound and proven investment ability.
- Ability to work accurately under pressure to meet deadlines and to deal with complex financial information quickly.
- Highly numerate and able to work to tight deadlines.
- Possesses good inter-personal skills.

Internal contacts

Support Specialists, Economists, Analysts.

External contacts

Other Financial Organisations, Merchant Banks, External Advisers, Brokers, Consultants.

Typical experience

3 - 5 years experience in Corporate Treasury, potentially coupled with relevant tertiary qualification and may have a back ground in General Finance or Accounting.

Other comments

Position Description

Position title:	**Senior Analyst Trading - Multi-Asset**
Position code:	**FINASM.TR.MAMF.4**
Level:	**4**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Trading Analyst - Multi-Asset**
Position code:	**FINASM.TR.MAMF.3**
Level:	**3**

Responsible for

Report to

Supervises

Main activities

Nil.

Key skills

Nil.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Chief Executive Officer**
Position code:	**FINFIN.LE.AIMF.8**
Level:	**8**

Responsible for

Achieving corporate objectives and effectively managing a company or a group of companies. Ensuring that agreed strategies are implemented. Accountable under the Companies Act for the statutory compliance of all business activities of the company.

Report to

Board of Directors (and Shareholders) or Overseas Principals.

Supervises

Directors, divisional and functional Managers.

Main activities

- Submitting business forecasts and budgets for the consideration of the Board and recommending major policy changes and developments.
- Monitoring and directing overall operations to achieve revenue and expense budgets and the satisfactory performance of the various profit centres across the organisation.
- Directing the preparation, communication, and execution of operating objectives, plans and programs.
- Negotiating major deals and financial arrangements, loan terms etc.
- Directing and motivating the executive team in the achievement of agreed goals and standards.
- Acting as the chief spokesperson for the organisation.

Key skills

- Sound leadership skills and a proven record of successful staff management. Must be an effective manager by exception.

Internal contacts

Functional and divisional managers, and all subordinate staff. Fellow directors on board/policy making management team.

External contacts

Industry associations, company bankers, other financial institutions both local and overseas, Government officials, major customers/clients, shareholders, major suppliers, legal firms, and the media.

Typical experience

Over 15 years general experience in all aspects of management at a senior level including functional areas such as Administration, HR, Marketing and Finance and coordination of multi-functional activities. Tertiary qualifications and management training.

Other comments

Position Description

Position title:	**GM Single Function**
Position code:	**FINFIN.LE.AJMF.7**
Level:	**7**

Responsible for

Managing a variety of divergent activities within a particular organisational function or single branch. May be physically isolated from Head Office and/or operate as an autonomous profit centre.

Report to

Chief Executive Officer/Managing Director or Chief Operating Officer.

Supervises

Managers and staff working within the responsibility of the particular functional area.

Main activities

- Coordinating and participating in the compilation of budgets and forecasts and presenting them to higher Senior Management for approval.
- Working to achieve agreed revenue to expense budgets with accountability for the overall financial performance of the functional area this role has particular responsibility for.
- Managing various operations within a division within the policies and guidelines established by Executive Management.
- Participating as a member of the Senior Management team.
- Managing and motivating all divisional staff.
- Participating in the negotiation of major sales deals within broad policy guidelines - if required.

Key skills

- Sound administrative skills and a proven record of successful people management.
- Proven Management experience at a senior level; must be an effective Manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Sales and Marketing staff, Customer Service and Product Development staff, Accounts and Administration staff.

External contacts

Major Suppliers and Clients/Customers, Industry Associations.

Typical experience

10-12+ years experience relevant to the particular area of responsibility coupled with tertiary level qualifications related to the industry. Formal Management training desirable.

Other comments

Position Description

Position title:	**General Manager/Head of Operational or Support Function**
Position code:	**FINFIN.LE.AEMF.7**
Level:	**7**

Responsible for

Managing a variety of diverse functional activities or areas operating separately as autonomous operational centres. People performing this role are responsible for implementing strategy within their particular areas of responsibility.

Report to

Chief Executive Officer/Managing Director or Chief Operating Officer.

Supervises

Managers and staff working within the functional areas.

Main activities

- Participating as a member of the senior management/strategic team formulating organisation policy and approving major management changes.
- Accountability for the overall performance of the functions/areas in Operational or Support Function, and the management of associated expense budgets.
- Ensuring that the functions/areas comply with senior management directives and statutory regulations.
- Directing and motivating managers and teams to achieve agreed targets.

Key skills

- Has a proven record of successful strategic planning and leadership.
- Proven management experience at a senior level; must be an effective manager by exception.
- Strong leadership and motivational ability.

Internal contacts

Members of the Senior Leadership Team. Sales and marketing staff, customer service and product development staff, accounts and administration staff.

External contacts

Typical experience

At least 12 to 15 years experience in all aspects of operation coupled with tertiary level qualifications related to the industry. Formal management training desirable.

Other comments

Position Description

Position title:	**General Manager/Head of Taxation**
Position code:	**FININF.FI.CTHC.7**
Level:	**7**

Responsible for

All taxation matters for the organisation at a strategic level.

Report to

CFO

Supervises

Taxation Specialist team

Main activities

- Ensuring the most effective and economic taxation policy through planning and management of the organisation's taxation liabilities, and contributing to the strategic planning process.
- Ensuring legislative and regulatory changes are acted upon, monitoring compliance and reporting on issues to senior management and the Board.
- Representing the organisation when required with regulatory and Government entities, and industry associations.

Key skills

- Accountancy and taxation qualifications. Recognised expert in taxation discipline.

Internal contacts

All departments throughout the organisation, Risk Management Committee.

External contacts

Consultants, government and other financial institutions.

Typical experience

At least 15 years of legal, compliance or applicable risk experience in a financial services environment together with relevant tertiary and post graduate qualifications.

Other comments

Position Description

Position title:	**Chief Risk Officer**
Position code:	**FINFIN.LE.RKCR.7**
Level:	**7**

Responsible for

Overseeing the execution of the risk management systems within the organisation. Managing and effectively executing a balance between risk and commercial regulatory requirements, commercial reward, advice and independent regulatory obligations.

Report to

Chief Executive Officer/Managing Director

Supervises

Main activities

- To translate the overall business strategy into a business plan and to deliver the financial, regulatory and technical objectives to achieve approved business plan.
- Provide advice to Executives on the management of regulatory changes within the Industry.
- Initiate, research and sponsor business improvement activities that promote superior service delivery and optimal resource allocation across distribution and support business units.
- Identify relevant change requirements within and across the business units and ensure execution of change is successful with consideration to legislation, people impacts and business requirements.Responsible for the overall maintenance of standards, policies and procedures which ensure regulatory compliance.
- Provide strong governance across functions such as Product, Actuarial, Risk & Business Analytics, Reinsurance, and Legal, Customer Relations, Fraud, Compliance & Governance functions to ensure legislative responsibilities are met, and internal controls are maintained.
- Provide strong governance across functions such as Product, Actuarial, Risk & Business Analytics, Reinsurance, and Legal, Customer Relations, Fraud, Compliance & Governance functions to ensure legislative responsibilities are met, and internal controls are maintained.
- Responsible for the overall management of all functions supporting the office of the CRO.

Key skills

- Strong communication, influencing and negotiation skills.
- Ability to build effective relationships with senior managers and other key stakeholders.
- High impact presentation skills, demonstrated leadership skills and the ability to think strategically.

Internal contacts

External contacts

Product, Actuarial, Risk & Business Analytics, Reinsurance, Legal, Customer Relations, Fraud, Compliance & Governance.

Typical experience

At least 10 years operations experience, with audit, accountancy or actuarial experience coupled with a relevant tertiary education.

Other comments

Position Description

Position title:	**Reinsurance Manager**
Position code:	**FININS.CX.MAMF.5**
Level:	**5**

Responsible for

All reinsurance activities within the company. Negotiating treaties and reinsurance agreements with other companies in the industry, and monitoring the levels of risk associated with each of the various product groups.

Report to

Group Manager, General Insurance Portfolios

Supervises

Reinsurance Accountant, Administration Manager and Accounts Assistants (Reinsurance Officers)

Main activities

- Managing and controlling the group's outward reinsurance programmes.
- Collating the necessary statistical, underwriting and claims information from branches and subsidiaries in New Zealand and overseas.
- Signing off all the reinsurance treaties for the group.
- Signing off all facultative placements associated with schemes and programmes.
- Preparing necessary board papers
- Overseeing preparation of returns to the ISC.
- Preparing quarterly inward treaties and reporting on the accuracy of reserves.
- Interacting with many levels of management throughout the company, industry bodies, brokers, intermediaries and other clients.

Key skills

- Broad knowledge of local markets and future growth potential.
- Effective leadership skills.
- Communication and negotiation skills.
- Broad knowledge of all insurance products, specialising in reinsurance.

Internal contacts

External contacts

Typical experience

Extensive broad based insurance experience, specialising in reinsurance for at least 10 years. Generally degree qualified or ANZIIF qualifications. Typically over 10 years in a management role

Other comments

Position Description

Position title:	**Reinsurance Analyst**
Position code:	**FININS.CX.MAMF.3**
Level:	**3**

Responsible for

Managing and maintaining the treaty and credit control functions within the Reinsurance Department.

Report to

Reinsurance Manager.

Supervises

No supervisory responsibilities.

Main activities

- Preparing and analysing financial reports for the Reinsurance operations of the organisation and undertaking the reconciliation of Reinsurance accounts.
- Performing notice of loss and facultative premium accounting for complex accounts.
- Supporting the claim reporting function by preparing necessary documentation.
- Processing of billing and payment activity for treaty accounts and coordinating assembly of billing packages.
- Working with claims reporting/tracking database to answer claim queries and communicate claim and billing activity.
- Pursuing collections in a timely manner by directly communicating with Reinsurers, reporting follow-up balances, undertaking ongoing analysis of debtors ageing and escalating non-payment issues to Reinsurance Manager.
- Preparing and reporting intermediate-level claims to reinsurers.

Key skills

- Working knowledge of insurance and reinsurance customs, practices and procedures.
- Ability to analyse and communicate financial information.
- Strong analytical, organisational and communication skills.
- Ability to interpret and apply contract language.
- High level of PC aptitude and ability.
- Ability to work in a team environment.

Internal contacts

Finance and Administration, Claims, Underwriting.

External contacts

Clients.

Typical experience

At least 3 years of accounting experience and experience within a credit control capacity, coupled with a relevant degree.

Other comments

Position Description

Position title:	**Reinsurance Accounting Manager Multi-Focus**
Position code:	**FININS.FI.RAMF.5**
Level:	**5**

Responsible for

All reinsurance activities within the company. Negotiating treaties and reinsurance agreements with other companies in the industry, and monitoring the levels of risk associated with each of the various product groups.

Report to

Group Manager, General Insurance Portfolios

Supervises

Reinsurance Accountant, Administration Manager and Accounts Assistants (Reinsurance Officers)

Main activities

- Managing and controlling the group's outward reinsurance programmes.
- Collating the necessary statistical, underwriting and claims information from branches and subsidiaries in New Zealand and overseas.
- Signing off all the reinsurance treaties for the group.
- Signing off all facultative placements associated with schemes and programmes.
- Preparing necessary board papers
- Overseeing preparation of returns to the ISC.
- Preparing quarterly inward treaties and reporting on the accuracy of reserves.
- Interacting with many levels of management throughout the company, industry bodies, brokers, intermediaries and other clients.

Key skills

- Broad knowledge of local markets and future growth potential.
- Effective leadership skills.
- Communication and negotiation skills.
- Broad knowledge of all insurance products, specialising in reinsurance.

Internal contacts

External contacts

Typical experience

Extensive broad based insurance experience, specialising in reinsurance for at least 10 years. Generally degree qualified or ANZIIF qualifications. Typically over 10 years in a management role

Other comments

Position Description

Position title:	**Senior Reinsurance/Technical Accountant Multi-Focus**
Position code:	**FININS.FI.RAMF.4**
Level:	**4**

Responsible for

The provision of technical and analytical support in the placement of outwards Reinsurance programs.

Report to

Reinsurance Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing expertise and guidance to recovery teams on technical issues.
- Providing support and assistance with reinsurer financial and claim audits as required and communicating financial information to clients.
- Working directly with business segments to provide recommendations on Reinsurance issues.
- Supporting arbitration or litigation proceedings in conjunction with Reinsurance.
- Investigating and resolving collection issues.
- Completing special projects and assignments related to Reinsurance recovery.
- Monitoring premium collections and reporting to reinsurers risk profiles and key exposures.

Key skills

- Strong verbal and written communication skills.
- Ability to analyse and disseminate technical and/or complex information to clients at all levels.

Internal contacts

Actuaries, Underwriters, Claims, Finance, Legal, Internal Auditors.

External contacts

Reinsurance Brokers, Legal Advisors, Industry Associations, External Auditors, Clients.

Typical experience

At least 3 years experience within the general insurance/reinsurance industry, coupled with relevant qualifications.

Other comments

Position Description

Position title:	**Reinsurance/Technical Accountant Multi-Focus**
Position code:	**FININS.FI.RAMF.3**
Level:	**3**

Responsible for

Managing and maintaining the treaty and credit control functions within the Reinsurance Department.

Report to

Reinsurance Manager

Supervises

No supervisory responsibilities.

Main activities

- Preparing and analysing financial reports for the Reinsurance operations of the organisation and undertaking the reconciliation of Reinsurance accounts.
- Performing notice of loss and facultative premium accounting for complex accounts.
- Supporting the claim reporting function by preparing necessary documentation.
- Processing of billing and payment activity for treaty accounts and coordinating assembly of billing packages.
- Working with claims reporting/tracking database to answer claim queries and communicate claim and billing activity.
- Pursuing collections in a timely manner by directly communicating with Reinsurers, reporting follow-up balances, undertaking ongoing analysis of debtors ageing and escalating non-payment issues to Reinsurance Manager.
- Preparing and reporting intermediate-level claims to reinsurers.

Key skills

- Working knowledge of insurance and reinsurance customs, practices and procedures.
- Ability to analyse and communicate financial information.
- Strong analytical, organisational and communication skills.
- Ability to interpret and apply contract language.
- High level of PC aptitude and ability.
- Ability to work in a team environment.

Internal contacts

Finance and Administration, Claims, Underwriting.

External contacts

Clients.

Typical experience

At least 3 years of accounting experience and experience within a credit control capacity, coupled with a relevant degree.

Other comments

Position Description

Position title:	**Reinsurance Administrator Multi-Focus**
Position code:	**FININS.FI.RAMF.2**
Level:	**2**

Responsible for

Managing and maintaining the treaty and credit control functions within the Reinsurance Department.

Report to

Reinsurance Manager.

Supervises

No supervisory responsibilities.

Main activities

- Preparing and analysing financial reports for the Reinsurance operations of the organisation and undertaking the reconciliation of Reinsurance accounts.
- Performing notice of loss and facultative premium accounting for complex accounts.
- Supporting the claim reporting function by preparing necessary documentation.
- Processing of billing and payment activity for treaty accounts and coordinating assembly of billing packages.
- Working with claims reporting/tracking database to answer claim queries and communicate claim and billing activity.
- Pursuing collections in a timely manner by directly communicating with Reinsurers, reporting follow-up balances, undertaking ongoing analysis of debtors ageing and escalating non-payment issues to Reinsurance Manager.
- Preparing and reporting intermediate-level claims to reinsurers.

Key skills

- Working knowledge of insurance and reinsurance customs, practices and procedures.
- Ability to analyse and communicate financial information.
- Strong analytical, organisational and communication skills.
- Ability to interpret and apply contract language.
- High level of PC aptitude and ability.
- Ability to work in a team environment.

Internal contacts

Finance and Administration, Claims, Underwriting.

External contacts

Clients.

Typical experience

At least 3 years of accounting experience and experience within a credit control capacity, coupled with a relevant degree.

Other comments

Position Description

Position title:	**Retrocession Manager**
Position code:	**FININS.RI.MAMF.5**
Level:	**5**

Responsible for

All reinsurance activities within the company. Negotiating treaties and reinsurance agreements with other companies in the industry, and monitoring the levels of risk associated with each of the various product groups.

Report to

Group Manager, General Insurance Portfolios

Supervises

Reinsurance Accountant, Administration Manager and Accounts Assistants (Reinsurance Officers)

Main activities

- Managing and controlling the group's outward reinsurance programmes.
- Collating the necessary statistical, underwriting and claims information from branches and subsidiaries in New Zealand and overseas.
- Signing off all the reinsurance treaties for the group.
- Signing off all facultative placements associated with schemes and programmes.
- Preparing necessary board papers
- Overseeing preparation of returns to the ISC.
- Preparing quarterly inward treaties and reporting on the accuracy of reserves.
- Interacting with many levels of management throughout the company, industry bodies, brokers, intermediaries and other clients.

Key skills

- Broad knowledge of local markets and future growth potential.
- Effective leadership skills.
- Communication and negotiation skills.
- Broad knowledge of all insurance products, specialising in reinsurance.

Internal contacts

External contacts

Typical experience

Extensive broad based insurance experience, specialising in reinsurance for at least 10 years. Generally degree qualified or ANZIIF qualifications. Typically over 10 years in a management role

Other comments

Position Description

Position title:	**Retrocession Analyst**
Position code:	**FININS.RI.MAMF.3**
Level:	**3**

Responsible for

Managing and maintaining the treaty and credit control functions within the Reinsurance Department.

Report to

Reinsurance Manager.

Supervises

No supervisory responsibilities.

Main activities

- Preparing and analysing financial reports for the Reinsurance operations of the organisation and undertaking the reconciliation of Reinsurance accounts.
- Performing notice of loss and facultative premium accounting for complex accounts.
- Supporting the claim reporting function by preparing necessary documentation.
- Processing of billing and payment activity for treaty accounts and coordinating assembly of billing packages.
- Working with claims reporting/tracking database to answer claim queries and communicate claim and billing activity.
- Pursuing collections in a timely manner by directly communicating with Reinsurers, reporting follow-up balances, undertaking ongoing analysis of debtors ageing and escalating non-payment issues to Reinsurance Manager.
- Preparing and reporting intermediate-level claims to reinsurers.

Key skills

- Working knowledge of insurance and reinsurance customs, practices and procedures.
- Ability to analyse and communicate financial information.
- Strong analytical, organisational and communication skills.
- Ability to interpret and apply contract language.
- High level of PC aptitude and ability.
- Ability to work in a team environment.

Internal contacts

Finance and Administration, Claims, Underwriting.

External contacts

Clients.

Typical experience

At least 3 years of accounting experience and experience within a credit control capacity, coupled with a relevant degree.

Other comments

Position Description

Position title:	**Head of Group Sponsor Relationship Management**
Position code:	**FINFIN.RM.GSMF.7**
Level:	**7**

Responsible for

Establishing and controlling the national sales strategy and sales force to achieve revenue and expense targets with a focus on existing accounts

Report to

Chief Executive/Managing Director.

Supervises

A national sales force, including state or area sales managers, product specialists and sales representatives.. Working with other relevant managers to develop national sales strategy.. Monitoring sales and expense performance, and initiating corrective action where necessaryDeveloping budget, and regularly reporting actual performance to budget, with variance analyses and revised projections.. Coordinating the gathering of market intelligence covering competitors' products and sales strategies.. Monitoring and reporting on the performance of dealers and distribution channels.. Recruiting, training and motivating sales staff.

Main activities

- Motivational and persuasive skills are very important, as are product knowledge, planning and administration, and an ability to negotiate complex sales at senior levels.
- Budgetary formulation and control abilities.

Key skills

- Marketing executives and specialists, state or branch managers/sales managers, credit, finance and human resources managers and legal officer.

Internal contacts

Major customers, advertising agencies and public relations firms, distributors, State and Federal Government official

External contacts

At least 12 years related sales/marketing experience. May have tertiary qualifications in technical/business areas.

Typical experience

Other comments

Position Description

Position title:	**National Account Manager - Group Sponsor Relationship Management**
Position code:	**FINFIN.RM.GSMF.6**
Level:	**6**

Responsible for

Maintains and develop relationships with organisation's strategic accounts, maximising revenue from in order to achieve agreed revenue targets/sales quotas and ensure account objectives are met.

Report to

Sales Manager, Senior Sales Manager, Sales Director.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' to close sales.

Main activities

- Formulating, implementing and managing business plans regarding strategic client accounts to achieve sales revenue/sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining the strategic client account.
- Working closely with strategic clients to determine their present and future needs, and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times.
- Lead the clients' strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of sales proposals, tenders/bids, contracts and account management plans.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Strong ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of the account, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

Sales, Marketing, Customer and Technical Support, Research and Development,

External contacts

Clients, suppliers, representatives of business partners, competitors, industry contacts, government bodies.

Typical experience

8 - 10 years of Sales experience, may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Account Manager - Group Sponsor Relationship Management**
Position code:	**FINFIN.RM.GSMF.5**
Level:	**5**

Responsible for

Maintains and develop relationships with organisation's strategic accounts, maximising revenue from in order to achieve agreed revenue targets/sales quotas and ensure account objectives are met.

Report to

Sales Manager, Senior Sales Manager, Sales Director.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' to close sales.

Main activities

- Formulating, implementing and managing business plans regarding strategic client accounts to achieve sales revenue/sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining the strategic client account.
- Working closely with strategic clients to determine their present and future needs, and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times.
- Lead the clients' strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of sales proposals, tenders/bids, contracts and account management plans.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Strong ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of the account, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

Sales, Marketing, Customer and Technical Support, Research and Development,

External contacts

Clients, suppliers, representatives of business partners, competitors, industry contacts, government bodies.

Typical experience

8 - 10 years of Sales experience, may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Account Executive - Group Sponsor Relationship Management**
Position code:	**FINFIN.RM.GSMF.4**
Level:	**4**

Responsible for

Maximising revenue from one or a small number of client accounts in order to achieve agreed revenue targets/sales quotas and ensure complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Sales Manager.

Supervises

Typically employees in this role would be individual contributors that would build a 'virtual team' in order to close sales, but may supervise more junior account managers on the account team

Main activities

- Formulating, implementing and managing strategic business plans regarding one or a small number of client accounts to achieve Sales revenue/Sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining designated account/s.
- Working closely with clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times and continually seeking the opportunity to participate in client's strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.

Key skills

- Proven Sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Specialist product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of designated accounts, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

All levels of Sales Staff, Marketing Staff, Customer & Technical Support, Research & Development Staff

External contacts

Clients, Suppliers, Representatives of Business Partners, Competitors, Industry Contacts, Government Bodies.

Typical experience

5 - 8 years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Account Executive - Group Sponsor Relationship Management**
Position code:	**FINFIN.RM.GSMF.3**
Level:	**3**

Responsible for

Maximising revenue from one or a small number of client accounts in order to achieve agreed revenue targets/sales quotas and ensure complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Sales Manager.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' in order to close sales.

Main activities

- Formulating, implementing and managing strategic business plans regarding one or a small number of client accounts to achieve Sales revenue/Sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining designated account/s.
- Working closely with clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times and continually seeking the opportunity to participate in clients' strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.

Key skills

- Proven Sales ability including strong negotiation skills, persuasive ability and excellent communication skills.
- Specialist product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of designated accounts, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

All levels of Sales Staff, Marketing Staff, Customer and Technical Support, Research and Development Staff,

External contacts

Clients, Suppliers, Representatives of Business Partners, Competitors, Industry Contacts, Government Bodies.

Typical experience

3 - 5 years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Assistant Account Executive - Group Sponsor Relationship Management**
Position code:	**FINFIN.RM.GSMF.2**
Level:	**2**

Responsible for
Supporting Account Managers in the delivery of the service.

Report to
National/Senior/Account Manager.

Supervises
No supervisory responsibilities.

Main activities
- Providing new business quotes and negotiating renewals.
- Assisting Account Managers in servicing customer base.
- Maintaining files.

Key skills
- Developing a knowledge of local markets.
- Effective organisational and communication skills.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Head of Intermediary Account Management**
Position code:	**FINFIN.RM.IKMF.7**
Level:	**7**

Responsible for

Establishing and controlling the national sales strategy and sales force to achieve revenue and expense targets with a focus on existing accounts

Report to

Chief Executive/Managing Director.

Supervises

A national sales force, including state or area sales managers, product specialists and sales representatives.. Working with other relevant managers to develop national sales strategy.. Monitoring sales and expense performance, and initiating corrective action where necessaryDeveloping budget, and regularly reporting actual performance to budget, with variance analyses and revised projections.. Coordinating the gathering of market intelligence covering competitors' products and sales strategies.. Monitoring and reporting on the performance of dealers and distribution channels.. Recruiting, training and motivating sales staff.

Main activities

- Motivational and persuasive skills are very important, as are product knowledge, planning and administration, and an ability to negotiate complex sales at senior levels.
- Budgetary formulation and control abilities.

Key skills

- Marketing executives and specialists, state or branch managers/sales managers, credit, finance and human resources managers and legal officer.

Internal contacts

Major customers, advertising agencies and public relations firms, distributors, State and Federal Government official

External contacts

At least 12 years related sales/marketing experience. May have tertiary qualifications in technical/business areas.

Typical experience

Other comments

Position Description

Position title:	**National Account Manager - Intermediaries**
Position code:	**FINFIN.RM.IKMF.6**
Level:	**6**

Responsible for

Maintains and develop relationships with organisation's strategic accounts, maximising revenue from in order to achieve agreed revenue targets/sales quotas and ensure account objectives are met.

Report to

Sales Manager, Senior Sales Manager, Sales Director.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' to close sales.

Main activities

- Formulating, implementing and managing business plans regarding strategic client accounts to achieve sales revenue/sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining the strategic client account.
- Working closely with strategic clients to determine their present and future needs, and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times.
- Lead the clients' strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of sales proposals, tenders/bids, contracts and account management plans.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Strong ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of the account, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

Sales, Marketing, Customer and Technical Support, Research and Development,

External contacts

Clients, suppliers, representatives of business partners, competitors, industry contacts, government bodies.

Typical experience

8 - 10 years of Sales experience, may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Account Manager - Intermediaries**
Position code:	**FINFIN.RM.IKMF.5**
Level:	**5**

Responsible for

Maintains and develop relationships with organisation's strategic accounts, maximising revenue from in order to achieve agreed revenue targets/sales quotas and ensure account objectives are met.

Report to

Sales Manager, Senior Sales Manager, Sales Director.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' to close sales.

Main activities

- Formulating, implementing and managing business plans regarding strategic client accounts to achieve sales revenue/sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining the strategic client account.
- Working closely with strategic clients to determine their present and future needs, and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times.
- Lead the clients' strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of sales proposals, tenders/bids, contracts and account management plans.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Strong ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of the account, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

Sales, Marketing, Customer and Technical Support, Research and Development,

External contacts

Clients, suppliers, representatives of business partners, competitors, industry contacts, government bodies.

Typical experience

8 - 10 years of Sales experience, may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Account Executive - Intermediaries**
Position code:	**FINFIN.RM.IKMF.4**
Level:	**4**

Responsible for

Maximising revenue from one or a small number of client accounts in order to achieve agreed revenue targets/sales quotas and ensure complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Sales Manager.

Supervises

Typically employees in this role would be individual contributors that would build a 'virtual team' in order to close sales, but may supervise more junior account managers on the account team

Main activities

- Formulating, implementing and managing strategic business plans regarding one or a small number of client accounts to achieve Sales revenue/Sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining designated account/s.
- Working closely with clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times and continually seeking the opportunity to participate in client's strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.

Key skills

- Proven Sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Specialist product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of designated accounts, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

All levels of Sales Staff, Marketing Staff, Customer & Technical Support, Research & Development Staff

External contacts

Clients, Suppliers, Representatives of Business Partners, Competitors, Industry Contacts, Government Bodies.

Typical experience

5 - 8 years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Account Executive - Intermediaries**
Position code:	**FINFIN.RM.IKMF.3**
Level:	**3**

Responsible for

Maximising revenue from one or a small number of client accounts in order to achieve agreed revenue targets/sales quotas and ensure complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Sales Manager.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' in order to close sales.

Main activities

- Formulating, implementing and managing strategic business plans regarding one or a small number of client accounts to achieve Sales revenue/Sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining designated account/s.
- Working closely with clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times and continually seeking the opportunity to participate in clients' strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.

Key skills

- Proven Sales ability including strong negotiation skills, persuasive ability and excellent communication skills.
- Specialist product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of designated accounts, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

All levels of Sales Staff, Marketing Staff, Customer and Technical Support, Research and Development Staff,

External contacts

Clients, Suppliers, Representatives of Business Partners, Competitors, Industry Contacts, Government Bodies.

Typical experience

3 - 5 years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Assistant Account Executive - Intermediaries**
Position code:	**FINFIN.RM.IKMF.2**
Level:	**2**

Responsible for
Supporting Account Managers in the delivery of the service.

Report to
National/Senior/Account Manager.

Supervises
No supervisory responsibilities.

Main activities
- Providing new business quotes and negotiating renewals.
- Assisting Account Managers in servicing customer base.
- Maintaining files.

Key skills
- Developing a knowledge of local markets.
- Effective organisational and communication skills.

Internal contacts

External contacts

Typical experience

Other comments

Position Description

Position title:	**Head of Account Management - Multi-Area**
Position code:	**FINFIN.RM.RMMF.7**
Level:	**7**

Responsible for

Establishing and controlling the national sales strategy and sales force to achieve revenue and expense targets with a focus on existing accounts

Report to

Chief Executive/Managing Director.

Supervises

A national sales force, including state or area sales managers, product specialists and sales representatives.. Working with other relevant managers to develop national sales strategy.. Monitoring sales and expense performance, and initiating corrective action where necessaryDeveloping budget, and regularly reporting actual performance to budget, with variance analyses and revised projections.. Coordinating the gathering of market intelligence covering competitors' products and sales strategies.. Monitoring and reporting on the performance of dealers and distribution channels.. Recruiting, training and motivating sales staff.

Main activities

- Motivational and persuasive skills are very important, as are product knowledge, planning and administration, and an ability to negotiate complex sales at senior levels.
- Budgetary formulation and control abilities.

Key skills

- Marketing executives and specialists, state or branch managers/sales managers, credit, finance and human resources managers and legal officer.

Internal contacts

Major customers, advertising agencies and public relations firms, distributors, State and Federal Government official

External contacts

At least 12 years related sales/marketing experience. May have tertiary qualifications in technical/business areas.

Typical experience

Other comments

Position Description

Position title:	**National Account Manager - Multi-Area**
Position code:	**FINFIN.RM.RMMF.6**
Level:	**6**

Responsible for

Working closely with the CEO or equivalent within the client's organisation to maximise revenue from a strategic client account in order to achieve agreed revenue targets/sales quotas and ensure complete customer satisfaction when dealing with the organisation.

Report to

Sales Director, General Manager.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' in order to close sales.

Main activities

- Consulting with the CEO or equivalent within the client's organisation to formulate, implement and manage strategic business plans regarding the client's account to achieve sales revenue/sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining the account.
- Working closely with strategic employees within the client's organisation to determine present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times and continually seeking the opportunity to participate in client's strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of sales proposals, tenders/bids, contracts and Account Management plans.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability, excellent communication skills and the ability to interact at a strategic level.
- Strong ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of the account, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

All levels of Staff, Marketing Staff, Customer & Technical Support, Research and Development Staff

External contacts

Clients, Suppliers, Representatives of Business Partners, Competitors, Industry Contacts, Government Bodies.

Typical experience

10+ years of Sales experience, may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Account Manager - Multi-Area**
Position code:	**FINFIN.RM.RMMF.5**
Level:	**5**

Responsible for

Maintains and develop relationships with organisation's strategic accounts, maximising revenue from in order to achieve agreed revenue targets/sales quotas and ensure account objectives are met.

Report to

Sales Manager, Senior Sales Manager, Sales Director.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' to close sales.

Main activities

- Formulating, implementing and managing business plans regarding strategic client accounts to achieve sales revenue/sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining the strategic client account.
- Working closely with strategic clients to determine their present and future needs, and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times.
- Lead the clients' strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of sales proposals, tenders/bids, contracts and account management plans.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Strong ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of the account, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

Sales, Marketing, Customer and Technical Support, Research and Development,

External contacts

Clients, suppliers, representatives of business partners, competitors, industry contacts, government bodies.

Typical experience

8 - 10 years of Sales experience, may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Account Executive - Multi-Area**
Position code:	**FINFIN.RM.RMMF.4**
Level:	**4**

Responsible for

Maximising revenue from one or a small number of client accounts in order to achieve agreed revenue targets/sales quotas and ensure complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Sales Manager.

Supervises

Typically employees in this role would be individual contributors that would build a 'virtual team' in order to close sales, but may supervise more junior account managers on the account team

Main activities

- Formulating, implementing and managing strategic business plans regarding one or a small number of client accounts to achieve Sales revenue/Sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining designated account/s.
- Working closely with clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times and continually seeking the opportunity to participate in client's strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.

Key skills

- Proven Sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Ability to motivate and manage direct and indirect teams of employees across multiple functions.
- Specialist product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of designated accounts, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

All levels of Sales Staff, Marketing Staff, Customer & Technical Support, Research & Development Staff

External contacts

Clients, Suppliers, Representatives of Business Partners, Competitors, Industry Contacts, Government Bodies.

Typical experience

5 - 8 years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Account Executive - Multi-Area**
Position code:	**FINFIN.RM.RMMF.3**
Level:	**3**

Responsible for

Maximising revenue from one or a small number of client accounts in order to achieve agreed revenue targets/sales quotas and ensure complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Sales Manager.

Supervises

No formal supervisory responsibilities. Employees in this role are individual contributors that would build a 'virtual team' in order to close sales.

Main activities

- Formulating, implementing and managing strategic business plans regarding one or a small number of client accounts to achieve Sales revenue/Sales quota targets.
- Selecting, coordinating and managing staff to complete tasks associated with retaining designated account/s.
- Working closely with clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times and continually seeking the opportunity to participate in clients' strategic business planning processes.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.

Key skills

- Proven Sales ability including strong negotiation skills, persuasive ability and excellent communication skills.
- Specialist product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Appreciation of the value/importance of designated accounts, coupled with the ability to balance the needs of the organisation and the client's organisation.

Internal contacts

All levels of Sales Staff, Marketing Staff, Customer and Technical Support, Research and Development Staff,

External contacts

Clients, Suppliers, Representatives of Business Partners, Competitors, Industry Contacts, Government Bodies.

Typical experience

3 - 5 years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Assistant Account Executive - Multi-Area**
Position code:	**FINFIN.RM.RMMF.2**
Level:	**2**

Responsible for

Supporting Account Managers in the delivery of the service.

Report to

National/Senior/Account Manager.

Supervises

No supervisory responsibilities.

Main activities

- Providing new business quotes and negotiating renewals.
- Assisting Account Managers in servicing customer base.
- Maintaining files.

Key skills

- Developing a knowledge of local markets.
- Effective organisational and communication skills.

Internal contacts

n/a

External contacts

n/a

Typical experience

n/a

Other comments

Position Description

Position title:	**Head of Credit Risk**
Position code:	**FININF.RK.CKHC.6**
Level:	**6**

Responsible for

Responsible for overseeing the development and implementation of robust processes and policy around Credit risk decision making

Report to

Chief Risk Officer

Supervises

Credit Risk team

Main activities

- Developing detailed Credit Risk Management framework for organisational divisions/departments, ensuring it is aligned with best practice and organisational strategy.
- Evaluating and reporting on operational policies and procedures to achieve the Credit Risk Management objectives and recommend improvements where necessary.
- Implementing new technology, improved Credit Risk Management techniques and approaches to assist risk identification, measurement and control.
- Facilitating and coordinating business unit documentation of operational policies and procedures.
- Monitoring the progress and potential impact of Credit risk management processes on existing and new projects/activities undertaken by the organisation.
- Serving as a reference point to managers on Credit Risk Management issues.
- Manages the Credit Risk team.

Key skills

- Ability to work closely with department managers and senior leaders.
- Excellent communication and interpersonal skills.
- Strong people management skills.

Internal contacts

All departments throughout the organisation, Risk Management Committee.

External contacts

Clients, Consultants, other financial institutions.

Typical experience

10+ years understanding credit risk. An audit background is an advantage. Tertiary qualifications or equivalent in Mathematics, Operations Research, Statistics or Business. Staff management experience is essential.

Other comments

Position Description

Position title:	**Credit Risk Manager**
Position code:	**FININF.RK.CKMF.5**
Level:	**5**

Responsible for

Driving the Credit Risk Management process implementation

Report to

Head of Credit Risk

Supervises

Credit Risk team

Main activities

- Drives risk/reward optimisation.
- Determines and delivers methodologies for key risk measures and controls.
- Negotiations changes/enhancements with model owners and business leaders.
- Validates mathematical theory, quantitative models, data, documentation and model outputs.
- Manages specific modelling frameworks to ensure alignment of business decisions with risk appetite of the Organisation.
- Participates in industry forums to assess and drive best practice.
-

Key skills

- Sound understanding of credit regulatory/legislative environment
- High attention to detail and organisational/time management skills
- Strong communication skills, both written and verbal. Ability to build effective working relationships with key stakeholders.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 7+ years relevant experience. Staff management experience is essential.

Other comments

Position Description

Position title:	**Senior Risk Analyst - Lending & Credit Risk**
Position code:	**FININF.RK.CKMF.4**
Level:	**4**

Responsible for

Ongoing monitoring of the credit and decision quality across the business.

Report to

Credit Risk Manager

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Coaches the business in understanding the risk methodology behind the results.
- Develops and applies complex models to assess, evaluate and measure risk.
- Identifies and resolves issues relating to existing models.
- Provides advice and influences decision-makers based on identified trends and implications to business performance.
- Provides advice to the business on how to manage risk effectively.
- Works with business leaders to establish enterprise-wide research methodologies.
- Keeps in touch with industry practice.

Key skills

- Good analytic skills and proven ability to identify trends, read and interpret data and communicate findings to stakeholders.
- Sound understanding of credit regulatory/legislative environment
- High attention to detail and organisational/time management skills
- Strong communication skills, both written and verbal. Ability to build effective working relationships with key stakeholders.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 5+ years relevant experience.

Other comments

Position Description

Position title:	**Risk Analyst - Lending & Credit Risk**
Position code:	**FININF.RK.CKMF.3**
Level:	**3**

Responsible for
Ongoing monitoring of the credit and decision quality across the business.

Report to
Credit Risk Manager

Supervises
No supervisory responsibilities.

Main activities
- Applies mathematical models to the assessment of risks.
- Makes sound recommendations for improvements to existing or new models based on analysis and findings.
- Prepares discussion papers and documents based on investigations & analysis.
- Applies knowledge of business and regulatory drivers when developing models and analysing findings.

Key skills
- Good analytic skills and proven ability to identify trends, read and interpret data and communicate findings to stakeholders.
- High attention to detail and organisational/time management skills

Internal contacts
Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts
Clients

Typical experience
Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 3-5+ years relevant experience.

Other comments

Position Description

Position title:	**Head of Enterprise Risk**
Position code:	**FININF.RK.ERHE.6**
Level:	**6**

Responsible for

Leading the Market Risk Team to minimise the impact of external market risks for the organisation.Oversee the development of strategy, policies and measurement of market risk in order to protect the organisation from that risk.

Report to

Chief Risk Officer or equivalent

Supervises

Market Risk Team

Main activities

- Leads the Market Risk team.
- Developing and implementing the Market Risk Management strategy and framework, ensuring it is aligned with best practice and organisational strategy.
- Evaluating and reporting on target areas to achieve the Market Risk Management objectives and recommend improvements where necessary.
- Drive the introduction of new technology, improved Market Risk Management techniques and approaches to assist risk identification, measurement and control, including foreign exchange exposure.
- Serving as a reference point to managers on Market Risk Management issues.

Key skills

- Ability to work closely with department managers and senior leaders.
- Excellent communication and interpersonal skills.
- Strong people management skills.

Internal contacts

All departments throughout the organisation, Risk Management Committee.

External contacts

Clients, Consultants, other financial institutions.

Typical experience

At least 10-15 years of legal, compliance or applicable risk experience in a financial services environment together with relevant tertiary and post graduate qualifications.

Other comments

Position Description

Position title:	**Enterprise Risk Manager**
Position code:	**FININF.RK.ERMF.5**
Level:	**5**

Responsible for

Monitoring, managing, and proactive preparation to minimise the impact of market risks for the organisation through the provision of advice, support and establishing standards and specifications for all company products/services that are affected by external market forces.

Report to

Head of Market Risk

Supervises

Market Risk Team

Main activities

- Manages the Market Risk Team and coaches the business in understanding the risk methodology behind the results.
- Provides advice to the business on how to manage risk effectively.
- Develops and applies complex models to assess, evaluate and measure risk.
- Provides advice and influences decision-makers based on identified trends and implications to business performance.
- Works with business leaders to establish enterprise-wide research methodologies.
- Keeps in touch with industry practice.

Key skills

- Sound understanding of credit regulatory/legislative environment
- High attention to detail and organisational/time management skills
- Strong communication skills, both written and verbal. Ability to build effective working relationships with key stakeholders.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 7+ years relevant experience. Staff management experience is essential.

Other comments

Position Description

Position title:	**Senior Risk Analyst - Enterprise Risk**
Position code:	**FININF.RK.ERMF.4**
Level:	**4**

Responsible for

Providing specialist technical advice in the development and ongoing maintenance of the Market Risk Program.

Report to

Manager, Market Risk

Supervises

May supervise Risk Analysts

Main activities

- Coaches the business in understanding the risk methodology behind the results.
- Develops and applies complex models to assess, evaluate and measure risk.
- Identifies and resolves issues relating to existing models.
- Provides advice on identified trends and implications to business performance.
- Provides advice to the business on how to manage risk effectively.
- Works with business leaders to establish enterprise-wide research methodologies.
- Keeps in touch with industry practice.

Key skills

- Good analytic skills and proven ability to identify trends, read and interpret data and communicate findings to stakeholders.
- Sound understanding of credit regulatory/legislative environment
- High attention to detail and organisational/time management skills
- Strong communication skills, both written and verbal. Ability to build effective working relationships with key stakeholders.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 5+ years relevant experience.

Other comments

Position Description

Position title:	**Risk Analyst - Enterprise Risk**
Position code:	**FININF.RK.ERMF.3**
Level:	**3**

Responsible for

Providing technical advice and insights for the Market Risk Program.

Report to

Manager, Market Risk

Supervises

No supervisory responsibilities

Main activities

- Applies mathematical models to the assessment of risks.
- Makes sound recommendations for improvements to existing or new models based on analysis and findings.
- Prepares discussion papers and documents based on investigations & analysis.
- Applies knowledge of business and regulatory drivers when developing models and analysing findings.

Key skills

- Good analytic skills and proven ability to identify trends, read and interpret data and communicate findings to stakeholders.
- High attention to detail and organisational/time management skills

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with at least 3 years relevant experience.

Other comments

Position Description

Position title:	**Head of Market Risk**
Position code:	**FININF.RK.MFHM.6**
Level:	**6**

Responsible for

Leading the Market Risk Team to minimise the impact of external market risks for the organisation.Oversee the development of strategy, policies and measurement of market risk in order to protect the organisation from that risk.

Report to

Chief Risk Officer or equivalent

Supervises

Market Risk Team

Main activities

- Leads the Market Risk team.
- Developing and implementing the Market Risk Management strategy and framework, ensuring it is aligned with best practice and organisational strategy.
- Evaluating and reporting on target areas to achieve the Market Risk Management objectives and recommend improvements where necessary.
- Drive the introduction of new technology, improved Market Risk Management techniques and approaches to assist risk identification, measurement and control, including foreign exchange exposure.
- Serving as a reference point to managers on Market Risk Management issues.

Key skills

- Ability to work closely with department managers and senior leaders.
- Excellent communication and interpersonal skills.
- Strong people management skills.

Internal contacts

All departments throughout the organisation, Risk Management Committee.

External contacts

Clients, Consultants, other financial institutions.

Typical experience

At least 10-15 years of legal, compliance or applicable risk experience in a financial services environment together with relevant tertiary and post graduate qualifications.

Other comments

Position Description

Position title:	**Market Risk Manager**
Position code:	**FININF.RK.MFMF.5**
Level:	**5**

Responsible for

Monitoring, managing, and proactive preparation to minimise the impact of market risks for the organisation through the provision of advice, support and establishing standards and specifications for all company products/services that are affected by external market forces.

Report to

Head of Market Risk

Supervises

Market Risk Team

Main activities

- Manages the Market Risk Team and coaches the business in understanding the risk methodology behind the results.
- Provides advice to the business on how to manage risk effectively.
- Develops and applies complex models to assess, evaluate and measure risk.
- Provides advice and influences decision-makers based on identified trends and implications to business performance.
- Works with business leaders to establish enterprise-wide research methodologies.
- Keeps in touch with industry practice.

Key skills

- Sound understanding of credit regulatory/legislative environment
- High attention to detail and organisational/time management skills
- Strong communication skills, both written and verbal. Ability to build effective working relationships with key stakeholders.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 7+ years relevant experience. Staff management experience is essential.

Other comments

Position Description

Position title:	**Senior Risk Analyst - Market Risk**
Position code:	**FININF.RK.MFMF.4**
Level:	**4**

Responsible for

Providing specialist technical advice in the development and ongoing maintenance of the Market Risk Program.

Report to

Manager, Market Risk

Supervises

May supervise Risk Analysts

Main activities

- Coaches the business in understanding the risk methodology behind the results.
- Develops and applies complex models to assess, evaluate and measure risk.
- Identifies and resolves issues relating to existing models.
- Provides advice on identified trends and implications to business performance.
-
  Provides advice to the business on how to manage risk effectively.
- Works with business leaders to establish enterprise-wide research methodologies.
- Keeps in touch with industry practice.

Key skills

- Good analytic skills and proven ability to identify trends, read and interpret data and communicate findings to stakeholders.
- Sound understanding of credit regulatory/legislative environment
- High attention to detail and organisational/time management skills
- Strong communication skills, both written and verbal. Ability to build effective working relationships with key stakeholders.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with 5+ years relevant experience.

Other comments

Position Description

Position title:	**Risk Analyst - Market Risk**
Position code:	**FININF.RK.MFMF.3**
Level:	**3**

Responsible for

Providing technical advice and insights for the Market Risk Program.

Report to

Manager, Market Risk

Supervises

No supervisory responsibilities

Main activities

- Applies mathematical models to the assessment of risks.
- Makes sound recommendations for improvements to existing or new models based on analysis and findings.
- Prepares discussion papers and documents based on investigations & analysis.
- Applies knowledge of business and regulatory drivers when developing models and analysing findings.

Key skills

- Good analytic skills and proven ability to identify trends, read and interpret data and communicate findings to stakeholders.
- High attention to detail and organisational/time management skills

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

Tertiary qualifications or equivalent in Business-related discipline, preferably in accounting and/or banking, coupled with at least 3 years relevant experience.

Other comments

Position Description

Position title:	**Head of Operational Risk**
Position code:	**FININF.RK.ORHO.6**
Level:	**6**

Responsible for

Leading the Team to develop operational risk policies and measure operational risk in order to protect the organisation from risk that is caused by inadequate or failed internal processes, people and systems or from external events.

Report to

Chief Risk Officer or equivalent

Supervises

Operational Risk & Compliance Team

Main activities

- Leading the Operational Risk and Compliance Team.
- . Responsible for the development and implementation of the Operational Risk Management framework, charter, policy statements and methodology, ensuring it is aligned with best practice and organisational strategy.
- Evaluating and reporting on operational policies and procedures to achieve the Operational Risk Management objectives and recommend improvements where necessary.
- Introducing new technology, improved Operational Risk Management techniques and approaches to assist risk identification, measurement and control.
- Monitoring the progress of Operational risk management processes on existing and new projects/activities undertaken by the organisation.
- Serving as a reference point to managers on Operational Risk Management issues.

Key skills

- Ability to work closely with department managers and senior leaders.
- Excellent communication and interpersonal skills.

Internal contacts

All departments throughout the organisation, Risk Management Committee.

External contacts

Clients, Consultants, other financial institutions, regulatory bodies.

Typical experience

At least 10 years of legal or compliance experience in a financial services environment together with relevant tertiary and post graduate qualifications.

Other comments

Position Description

Position title:	**Operational Risk Manager**
Position code:	**FININF.RK.ORMF.5**
Level:	**5**

Responsible for

Managing the provision of operational risk and regulatory advice, support and establishing standards and specifications for all company products/services that have to comply.

Report to

Head of Operational Risk & Compliance

Supervises

Operational Risk & Compliance Team

Main activities

- Providing expert Operational Risk and Compliance advice and guidance to the organisation.
- Developing policies, procedures and compliance programs.
- Ensuring relevant compliance and policies for new and current products.
- Recommending changes to product specifications in line with all external and internal requirements.
- Understanding both regulatory requirements and best practice and reporting regularly to management on changes and emerging issues affecting the industry.
- Maintaining effective relationships with both internal and external stakeholders.
- Sourcing relevant information to ensure the group is at the forefront of operational risk and compliance management.

Key skills

- Excellent communication, influential and negotiation skills.
- Ability to interpret relevant regulation legislation.
- Knowledge of political and economic structures of key global economies.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients, Consultants, other financial institutions, regulatory bodies.

Typical experience

At least 7+ years of legal or compliance experience in a financial services environment together with relevant qualifications.

Other comments

Position Description

Position title:	**Senior Risk Analyst - Operational Risk**
Position code:	**FININF.RK.ORMF.4**
Level:	**4**

Responsible for

Providing specialist technical advice to assigned business functions in the development and ongoing maintenance of their Compliance Programmes.

Report to

Manager, Operational Risk & Compliance

Supervises

May supervise Risk Analysts

Main activities

- Promoting and participating in the development of a high quality Compliance Programmes and the necessary procedures, documentation and training.
- Assisting in the identification, preparation and development of appropriate training materials.
- Identifying risk areas and facilitating means to remove or better manage those areas by providing Compliance advice.

Key skills

- Excellent understanding of organisations Compliance program.
- Good knowledge of regulation and legislation affecting the organisation.
- Good knowledge of organisations policy and procedures.

Internal contacts

Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts

Clients

Typical experience

5+ years of business experience coupled with Legal or Business tertiary qualification .

Other comments

Position Description

Position title:	**Risk Analyst - Operational Risk**
Position code:	**FININF.RK.ORMF.3**
Level:	**3**

Responsible for
Providing regulatory advice, support and assistance in establishing standards and specifications for all company products/services that have to comply with Government Regulations.

Report to
Manager, Operational Risk & Compliance

Supervises
No supervisory responsibilities.

Main activities
- Assisting with the establishment and coordination of all relevant legislative, regulatory, contractual and other compliance processes.
- Assisting in the planning and preparation of submissions on product specifications.
- Recommending changes to product specifications and processes in line with statutory and best practice requirements.
- Assisting in the development of regulatory reports for regional and overseas offices where applicable.
- Assisting in the researching and sourcing of information to ensure the group is at the forefront of regulatory management.
- Assisting with the roll-out and maintenance of compliance related software systems to manage compliance obligations.
- Assisting with risk management and risk reporting activities as required.
- Providing support for contract management/administration as required.

Key skills
- Good communication skills.
- Ability to interpret relevant regulatory legislation.
- Knowledge of political and economic structures of key global economies.

Internal contacts
Internal Auditor, Loans Manager, Collections Manager, Training Department, Finance Department,

External contacts
Clients

Typical experience
At least 3 years of legal or compliance experience in a commercial environment together with relevant qualifications in law, business, commerce or equivalent. May also have come from a risk management or contract administration background.

Other comments

Position Description

Position title:	**Head of Sales**
Position code:	**FINFIN.SA.MAMF.7**
Level:	**7**

Responsible for

Establishing and controlling the national sales strategy and Sales force to achieve revenue and expense targets.

Report to

Chief Executive/Managing Director.

Supervises

A national Sales force, including Region or Area Sales Managers, Product Specialists and Sales Representatives.

Main activities

- Negotiating major deals and maintaining key customer contacts at senior levels.
- Working with other relevant Managers to develop national sales strategy.
- Monitoring sales and expense performance and initiating corrective action where necessary.
- Developing budget and regularly reporting actual performance to budget, with variance analyses and revised projections.
- Coordinating the gathering of market intelligence covering competitors' products and sales strategies.
- Monitoring and reporting on the performance of dealers and distribution channels.
- Recruiting, training and motivating sales staff.

Key skills

- Sound product and industry knowledge.
- Budgetary formulation and control abilities.
- Ability to negotiate complex sales at senior levels.
- Excellent planning and administrative abilities.
- Excellent motivational and persuasive skills.

Internal contacts

Marketing executives and specialists, region or branch managers/sales managers, credit, finance and human resources managers and legal officer.

External contacts

Major customers, advertising agencies and public relations firms, distributors, Government officials.

Typical experience

At least 12 years related sales/marketing experience coupled with relevant tertiary qualifications in technical/business areas.

Other comments

This role is primarily managerial requiring a sound sales background.

Position Description

Position title:	**Senior Sales/Business Development Manager**
Position code:	**FINFIN.SA.MAMF.6**
Level:	**6**

Responsible for

Controlling the organisation's Sales activities within an industry sector, line of business (LOB), regional location or market segment to achieve predetermined Sales targets from new and existing clients and ensure complete customer satisfaction when dealing with the organisation.

Report to

Sales Director, General Manager.

Supervises

A team of Sales Account Managers, Sales Representatives and Sales Administration staff.

Main activities

- Planning and directing the activities of a team of Sales Account Managers and Sales Representatives, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and strategic direction for the Industry Sector/LOB/Products/Region/Market and aligning the Industry Sector/LOB/Products/Region/Market with a broader business plan.
- Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Significantly contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Coordinating the gathering of market intelligence and monitoring competitors' Sales strategies and products, campaigns and events to optimise market share.
- Overseeing the recruitment, selection and training of Sales staff.

Key skills

- Proven Sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Strategic management, leadership, mentoring, business, accounting and reporting capabilities.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Executive Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

10+ years of experience, may possess relevant tertiary qualifications.

Other comments

This role performs a mix of Sales oriented and Managerial tasks. Alternative Titles: Senior Regional/Branch Sales Manager; Regional Sales Manager.

Position Description

Position title:	**Sales/Business Development Manager**
Position code:	**FINFIN.SA.MAMF.5**
Level:	**5**

Responsible for

Acting as the first line of Management, directing team/s of Sales Representatives and Account Managers to achieve predetermined Sales targets from new and existing clients and ensuring complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Business Unit Sales Manager, Sales Director.

Supervises

A team of Sales Representatives, Account Managers and Sales Administration staff.

Main activities

- Planning and directing the activities of team/s of Sales Representatives, and Account Managers, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and direction, aligning Sales activities with the broader business plan. Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Understanding the client's objectives, buying criteria and decision making processes and forming long term business partnerships in order to leverage revenue from the relationship and promote the organisation as a quality supplier with the aim of achieving preferred supplier status.
- Monitoring competitors' Sales and product strategies, campaigns and events to optimise market share.
- Recruiting, selecting and training Sales staff.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, leadership, mentoring, business, accounting and reporting skills.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Senior Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

8-10 years of experience, may possess relevant tertiary qualifications.

Other comments

This role performs a mix of Sales oriented and Managerial tasks.

Position Description

Position title:	**Senior Sales Representative/Business Development Specialist**
Position code:	**FINFIN.SA.MAMF.4**
Level:	**4**

Responsible for

Sourcing relationships with clients and key decision makers to develop business opportunities for a new sector, product, service, solution or client.

Report to

Business Development Manager.

Supervises

No supervisory responsibilities.

Main activities

- Developing a market sector by generating sales leads for a brand new organisational product, service or solution. This may be done when the product, service or solution is still in the pipeline.
- Assessing potential partners, performing competitive research, evaluating proposed deals/partnerships and analysing and developing business cases for new business targets.
- Developing new products, services or solutions by combining several existing products/services and generating leads to establish a corresponding market sector in order to gain new business for the organisation.
- Combining existing products/services for a specific client thereby creating a new product, service or solution that once sold becomes a standard organisational offering.
- Generating term sheets and new business/financial models and drafting and negotiating contracts.
- Identifying opportunities for business improvement and strategic new business opportunities.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, business, accounting and reporting skills.
- Creativity and a flair for innovation.

Internal contacts

Sales staff at all levels, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Customers, Prospective Customers.

Typical experience

5-8 years of Sales experience and may either possess or be working towards relevant tertiary business qualifications.

Other comments

Products, services and solutions sold, or market sectors created by this role would be passed onto Direct End User Sales Representatives or Account Managers once they have been established as standard entities within the organisation.

Position Description

Position title:	**Sales Representative/Business Development Associate**
Position code:	**FINFIN.SA.MAMF.3**
Level:	**3**

Responsible for

Achieving an agreed revenue target or sales quota by identifying and gaining business from new and existing clients and ensuring complete customer satisfaction when dealing with the organisation.

Report to

Sales Manager, Business Unit Sales Manager, Senior Sales Manager.

Supervises

No supervisory responsibilities.

Main activities

- Working closely with new and existing clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Maintaining call rates to assure contact with assigned clients and acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times.
- Understanding the customer's objectives, buying criteria and decision making processes and forming long term business partnerships in order to leverage revenue from the relationship and promote the organisation as a quality supplier with the aim of achieving preferred supplier status.
- Negotiating price and volume discounts (where applicable) in accordance with the organisation's policies and liaising with Technical Support staff regarding technical issues to ensure client retention and continued business.
- Identifying and gaining new business through a sustained program of cold calling, mailing and following up referrals/leads and keeping abreast of competitor's Sales strategies.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.
- Coordinating, conducting and participating in Sales promotions, campaigns, events and displays.

Key skills

- Proven Sales ability including negotiation skills, persuasive ability and excellent communication skills.
- Sound product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.

Internal contacts

Sales Management, Sale Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Customers, Suppliers.

Typical experience

2+ years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Alternative Titles: Sales Executive; Sales Consultant.

Position Description

Position title:	**Senior Sales Manager - Direct**
Position code:	**FINFIN.SA.DPMF.6**
Level:	**6**

Responsible for

Controlling the organisation's Sales activities within an industry sector, line of business (LOB), regional location or market segment to achieve predetermined Sales targets from new and existing clients and ensure complete customer satisfaction when dealing with the organisation.

Report to

Sales Director, General Manager.

Supervises

A team of Sales Account Managers, Sales Representatives and Sales Administration staff.

Main activities

- Planning and directing the activities of a team of Sales Account Managers and Sales Representatives, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and strategic direction for the Industry Sector/LOB/Products/Region/Market and aligning the Industry Sector/LOB/Products/Region/Market with a broader business plan.
- Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Significantly contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Coordinating the gathering of market intelligence and monitoring competitors' Sales strategies and products, campaigns and events to optimise market share.
- Overseeing the recruitment, selection and training of Sales staff.

Key skills

- Proven Sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Strategic management, leadership, mentoring, business, accounting and reporting capabilities.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Executive Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

10+ years of experience, may possess relevant tertiary qualifications.

Other comments

This role performs a mix of Sales oriented and Managerial tasks. Alternative Titles: Senior Regional/Branch Sales Manager; Regional Sales Manager.

Position Description

Position title:	**Sales Manager - Direct**
Position code:	**FINFIN.SA.DPMF.5**
Level:	**5**

Responsible for

Acting as the first line of Management, directing team/s of Sales Representatives and Account Managers to achieve predetermined Sales targets from new and existing clients and ensuring complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Business Unit Sales Manager, Sales Director.

Supervises

A team of Sales Representatives, Account Managers and Sales Administration staff.

Main activities

- Planning and directing the activities of team/s of Sales Representatives, and Account Managers, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and direction, aligning Sales activities with the broader business plan. Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Understanding the client's objectives, buying criteria and decision making processes and forming long term business partnerships in order to leverage revenue from the relationship and promote the organisation as a quality supplier with the aim of achieving preferred supplier status.
- Monitoring competitors' Sales and product strategies, campaigns and events to optimise market share.
- Recruiting, selecting and training Sales staff.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, leadership, mentoring, business, accounting and reporting skills.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Senior Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

8-10 years of experience, may possess relevant tertiary qualifications.

Other comments

This role performs a mix of Sales oriented and Managerial tasks.

Position Description

Position title:	**Senior Sales Representative - Direct**
Position code:	**FINFIN.SA.DPMF.4**
Level:	**4**

Responsible for

Sourcing relationships with clients and key decision makers to develop business opportunities for a new sector, product, service, solution or client.

Report to

Business Development Manager.

Supervises

No supervisory responsibilities.

Main activities

- Developing a market sector by generating sales leads for a brand new organisational product, service or solution. This may be done when the product, service or solution is still in the pipeline.
- Assessing potential partners, performing competitive research, evaluating proposed deals/partnerships and analysing and developing business cases for new business targets.
- Developing new products, services or solutions by combining several existing products/services and generating leads to establish a corresponding market sector in order to gain new business for the organisation.
- Combining existing products/services for a specific client thereby creating a new product, service or solution that once sold becomes a standard organisational offering.
- Generating term sheets and new business/financial models and drafting and negotiating contracts.
- Identifying opportunities for business improvement and strategic new business opportunities.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, business, accounting and reporting skills.
- Creativity and a flair for innovation.

Internal contacts

Sales staff at all levels, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Customers, Prospective Customers.

Typical experience

5-8 years of Sales experience and may either possess or be working towards relevant tertiary business qualifications.

Other comments

Position Description

Position title:	**Sales Representative - Direct**
Position code:	**FINFIN.SA.DPMF.3**
Level:	**3**

Responsible for

Achieving an agreed revenue target or sales quota by identifying and gaining business from new and existing clients and ensuring complete customer satisfaction when dealing with the organisation.

Report to

Sales Manager, Business Unit Sales Manager, Senior Sales Manager.

Supervises

No supervisory responsibilities.

Main activities

- Working closely with new and existing clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Maintaining call rates to assure contact with assigned clients and acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times.
- Understanding the customer's objectives, buying criteria and decision making processes and forming long term business partnerships in order to leverage revenue from the relationship and promote the organisation as a quality supplier with the aim of achieving preferred supplier status.
- Negotiating price and volume discounts (where applicable) in accordance with the organisation's policies and liaising with Technical Support staff regarding technical issues to ensure client retention and continued business.
- Identifying and gaining new business through a sustained program of cold calling, mailing and following up referrals/leads and keeping abreast of competitor's Sales strategies.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.
- Coordinating, conducting and participating in Sales promotions, campaigns, events and displays.

Key skills

- Proven Sales ability including negotiation skills, persuasive ability and excellent communication skills.
- Sound product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.

Internal contacts

Sales Management, Sale Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Customers, Suppliers.

Typical experience

2+ years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Telesales Representative**
Position code:	**FINFIN.SA.DRMF.2**
Level:	**2**

Responsible for

Building long term relationships with a defined customer base to support company product promotions and customer loyalty.

Report to

Contact Centre Team Leader

Supervises

No supervisory responsibilities.

Main activities

- Contributing to the achievement of departmental profitability and market penetration targets by maintaining regular call-cycles with allocated customer base.
- Actively building relationships by exceeding customer needs and resolving concerns or issues.
- Ensuring an understanding of their business and product/service requirements and assisting in the choice of appropriate solutions for their needs/problems.
- Ensuring that all relevant procedures and guidelines are adhered to.

Key skills

- Excellent telephone skills and a customer service focus.
- Ensures accuracy and quality of work in information which meets customer and organisation expectations
- Product knowledge/Technical knowledge of banking systems.
- Ability to guide and motivate individuals and a group to achieve desired outcomes.

Internal contacts

Other Contact Centre and support staff

External contacts

Customers.

Typical experience

At least 3-4 years of experience in all aspects of the organisation's offering as well as the ability to present and promote the organisation's complex product line.

Other comments

Position Description

Position title:	**Senior Sales Manager - Group Sales**
Position code:	**FINFIN.SA.GSMF.6**
Level:	**6**

Responsible for

Controlling the organisation's Sales activities within an industry sector, line of business (LOB), regional location or market segment to achieve predetermined Sales targets from new and existing clients and ensure complete customer satisfaction when dealing with the organisation.

Report to

Sales Director, General Manager.

Supervises

A team of Sales Account Managers, Sales Representatives and Sales Administration staff.

Main activities

- Planning and directing the activities of a team of Sales Account Managers and Sales Representatives, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and strategic direction for the Industry Sector/LOB/Products/Region/Market and aligning the Industry Sector/LOB/Products/Region/Market with a broader business plan.
- Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Significantly contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Coordinating the gathering of market intelligence and monitoring competitors' Sales strategies and products, campaigns and events to optimise market share.
- Overseeing the recruitment, selection and training of Sales staff.

Key skills

- Proven Sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Strategic management, leadership, mentoring, business, accounting and reporting capabilities.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Executive Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

10+ years of experience, may possess relevant tertiary qualifications.

Other comments

This role performs a mix of Sales oriented and Managerial tasks. Alternative Titles: Senior Regional/Branch Sales Manager; Regional Sales Manager.

Position Description

Position title:	**Sales Manager - Group Sales**
Position code:	**FINFIN.SA.GSMF.5**
Level:	**5**

Responsible for

Acting as the first line of Management, directing team/s of Sales Representatives and Account Managers to achieve predetermined Sales targets from new and existing clients and ensuring complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Business Unit Sales Manager, Sales Director.

Supervises

A team of Sales Representatives, Account Managers and Sales Administration staff.

Main activities

- Planning and directing the activities of team/s of Sales Representatives, and Account Managers, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and direction, aligning Sales activities with the broader business plan. Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Understanding the client's objectives, buying criteria and decision making processes and forming long term business partnerships in order to leverage revenue from the relationship and promote the organisation as a quality supplier with the aim of achieving preferred supplier status.
- Monitoring competitors' Sales and product strategies, campaigns and events to optimise market share.
- Recruiting, selecting and training Sales staff.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, leadership, mentoring, business, accounting and reporting skills.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Senior Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

8-10 years of experience, may possess relevant tertiary qualifications.

Other comments

This role performs a mix of Sales oriented and Managerial tasks.

Position Description

Position title:	**Senior Sales Representative - Group Sales**
Position code:	**FINFIN.SA.GSMF.4**
Level:	**4**

Responsible for

Sourcing relationships with clients and key decision makers to develop business opportunities for a new sector, product, service, solution or client.

Report to

Business Development Manager.

Supervises

No supervisory responsibilities.

Main activities

- Developing a market sector by generating sales leads for a brand new organisational product, service or solution. This may be done when the product, service or solution is still in the pipeline.
- Assessing potential partners, performing competitive research, evaluating proposed deals/partnerships and analysing and developing business cases for new business targets.
- Developing new products, services or solutions by combining several existing products/services and generating leads to establish a corresponding market sector in order to gain new business for the organisation.
- Combining existing products/services for a specific client thereby creating a new product, service or solution that once sold becomes a standard organisational offering.
- Generating term sheets and new business/financial models and drafting and negotiating contracts.
- Identifying opportunities for business improvement and strategic new business opportunities.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, business, accounting and reporting skills.
- Creativity and a flair for innovation.

Internal contacts

Sales staff at all levels, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Customers, Prospective Customers.

Typical experience

5-8 years of Sales experience and may either possess or be working towards relevant tertiary business qualifications.

Other comments

Position Description

Position title:	**Sales Representative - Group Sales**
Position code:	**FINFIN.SA.GSMF.3**
Level:	**3**

Responsible for

Achieving an agreed revenue target or sales quota by identifying and gaining business from new and existing clients and ensuring complete customer satisfaction when dealing with the organisation.

Report to

Sales Manager, Business Unit Sales Manager, Senior Sales Manager.

Supervises

No supervisory responsibilities.

Main activities

- Working closely with new and existing clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Maintaining call rates to assure contact with assigned clients and acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times.
- Understanding the customer's objectives, buying criteria and decision making processes and forming long term business partnerships in order to leverage revenue from the relationship and promote the organisation as a quality supplier with the aim of achieving preferred supplier status.
- Negotiating price and volume discounts (where applicable) in accordance with the organisation's policies and liaising with Technical Support staff regarding technical issues to ensure client retention and continued business.
- Identifying and gaining new business through a sustained program of cold calling, mailing and following up referrals/leads and keeping abreast of competitor's Sales strategies.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.
- Coordinating, conducting and participating in Sales promotions, campaigns, events and displays.

Key skills

- Proven Sales ability including negotiation skills, persuasive ability and excellent communication skills.
- Sound product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.

Internal contacts

Sales Management, Sale Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Customers, Suppliers.

Typical experience

2+ years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Sales Manager - Bancassurance**
Position code:	**FINFIN.SA.BAMF.6**
Level:	**6**

Responsible for

Controlling the organisation's Sales activities within an industry sector, line of business (LOB), regional location or market segment to achieve predetermined Sales targets from new and existing clients and ensure complete customer satisfaction when dealing with the organisation.

Report to

Sales Director, General Manager.

Supervises

A team of Sales Account Managers, Sales Representatives and Sales Administration staff.

Main activities

- Planning and directing the activities of a team of Sales Account Managers and Sales Representatives, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and strategic direction for the Industry Sector/LOB/Products/Region/Market and aligning the Industry Sector/LOB/Products/Region/Market with a broader business plan.
- Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Significantly contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Coordinating the gathering of market intelligence and monitoring competitors' Sales strategies and products, campaigns and events to optimise market share.
- Overseeing the recruitment, selection and training of Sales staff.

Key skills

- Proven Sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Strategic management, leadership, mentoring, business, accounting and reporting capabilities.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Executive Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

10+ years of experience, may possess relevant tertiary qualifications.

Other comments

This role performs a mix of Sales oriented and Managerial tasks. Alternative Titles: Senior Regional/Branch Sales Manager; Regional Sales Manager.

Position Description

Position title:	**Sales Manager - Bancassurance**
Position code:	**FINFIN.SA.BAMF.5**
Level:	**5**

Responsible for

Acting as the first line of Management, directing team/s of Sales Representatives and Account Managers to achieve predetermined Sales targets from new and existing clients and ensuring complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Business Unit Sales Manager, Sales Director.

Supervises

A team of Sales Representatives, Account Managers and Sales Administration staff.

Main activities

- Planning and directing the activities of team/s of Sales Representatives, and Account Managers, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and direction, aligning Sales activities with the broader business plan. Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Understanding the client's objectives, buying criteria and decision making processes and forming long term business partnerships in order to leverage revenue from the relationship and promote the organisation as a quality supplier with the aim of achieving preferred supplier status.
- Monitoring competitors' Sales and product strategies, campaigns and events to optimise market share.
- Recruiting, selecting and training Sales staff.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, leadership, mentoring, business, accounting and reporting skills.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Senior Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

8-10 years of experience, may possess relevant tertiary qualifications.

Other comments

This role performs a mix of Sales oriented and Managerial tasks.

Position Description

Position title:	**Senior Sales Representative - Bancassurance**
Position code:	**FINFIN.SA.BAMF.4**
Level:	**4**

Responsible for

Sourcing relationships with clients and key decision makers to develop business opportunities for a new sector, product, service, solution or client.

Report to

Business Development Manager.

Supervises

No supervisory responsibilities.

Main activities

- Developing a market sector by generating sales leads for a brand new organisational product, service or solution. This may be done when the product, service or solution is still in the pipeline.
- Assessing potential partners, performing competitive research, evaluating proposed deals/partnerships and analysing and developing business cases for new business targets.
- Developing new products, services or solutions by combining several existing products/services and generating leads to establish a corresponding market sector in order to gain new business for the organisation.
- Combining existing products/services for a specific client thereby creating a new product, service or solution that once sold becomes a standard organisational offering.
- Generating term sheets and new business/financial models and drafting and negotiating contracts.
- Identifying opportunities for business improvement and strategic new business opportunities.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, business, accounting and reporting skills.
- Creativity and a flair for innovation.

Internal contacts

Sales staff at all levels, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Customers, Prospective Customers.

Typical experience

5-8 years of Sales experience and may either possess or be working towards relevant tertiary business qualifications.

Other comments

Position Description

Position title:	**Sales Representative - Bancassurance**
Position code:	**FINFIN.SA.BAMF.3**
Level:	**3**

Responsible for

Achieving an agreed revenue target or sales quota by identifying and gaining business from new and existing clients and ensuring complete customer satisfaction when dealing with the organisation.

Report to

Sales Manager, Business Unit Sales Manager, Senior Sales Manager.

Supervises

No supervisory responsibilities.

Main activities

- Working closely with new and existing clients to determine their present and future needs and proposing suitable products, services and upgrades in order to maintain and grow revenue for the organisation.
- Maintaining call rates to assure contact with assigned clients and acting as the main interface between the client and the organisation to ensure an optimal level of service is provided at all times.
- Understanding the customer's objectives, buying criteria and decision making processes and forming long term business partnerships in order to leverage revenue from the relationship and promote the organisation as a quality supplier with the aim of achieving preferred supplier status.
- Negotiating price and volume discounts (where applicable) in accordance with the organisation's policies and liaising with Technical Support staff regarding technical issues to ensure client retention and continued business.
- Identifying and gaining new business through a sustained program of cold calling, mailing and following up referrals/leads and keeping abreast of competitor's Sales strategies.
- Conducting product demonstrations (where applicable) and coordinating the preparation of Sales proposals, tenders/bids, contracts and Account Management plans.
- Coordinating, conducting and participating in Sales promotions, campaigns, events and displays.

Key skills

- Proven Sales ability including negotiation skills, persuasive ability and excellent communication skills.
- Sound product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.

Internal contacts

Sales Management, Sale Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Customers, Suppliers.

Typical experience

2+ years of Sales experience, and may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Manager - Sales Support Operations**
Position code:	**FINFIN.SA.SSMF.5**
Level:	**5**

Responsible for

Acting as the first line of Management, directing team/s of Sales Representatives and Account Managers to achieve predetermined Sales targets from new and existing clients and ensuring complete customer satisfaction when dealing with the organisation.

Report to

Senior Sales Manager, Business Unit Sales Manager, Sales Director.

Supervises

A team of Sales Representatives, Account Managers and Sales Administration staff.

Main activities

- Planning and directing the activities of team/s of Sales Representatives and Account Managers, ensuring all Staff are motivated to attain predetermined Sales targets.
- Negotiating major deals within policy guidelines, maintaining contact with key clients and identifying and steering opportunities for business improvement.
- Providing leadership and direction, aligning Sales activities with the broader business plan. Regularly reporting actual performance to budget, with variance analyses and revised projections.
- Contributing to the setting of Sales strategies and related Sales and expense budgets. Monitoring the Sales revenue, margin and expense performance and initiating corrective action where required.
- Understanding the clients' objectives, buying criteria and decision making processes and forming long term business partnerships in order to leverage revenue from the relationship and promote the organisation as a quality supplier with the aim of achieving preferred supplier status.
- Monitoring competitors' Sales and product strategies, campaigns and events to optimise market share.
- Recruiting, selecting and training Sales staff.

Key skills

- Proven sales ability including outstanding negotiation skills, persuasive ability and excellent communication skills.
- Expert product and industry knowledge coupled with the ability to deal with clients at all levels and translate client needs into a complete solution.
- Management, leadership, mentoring, business, accounting and reporting skills.
- Analytical interpretation and advanced problem solving abilities.

Internal contacts

Senior Sales Management, Sales Administration staff, Marketing staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

8-10 years of experience, may possess relevant tertiary qualifications.

Other comments

Position Description

Position title:	**Team Leader - Sales Support**
Position code:	**FINFIN.SA.SSMF.4**
Level:	**4**

Responsible for
Leading a team of Sales Administration/Internal Sales Staff to provide administration support to the Sales Team.

Report to
Sales Administration/Internal Sales Manager, Sales Manager, Senior Sales Manager, Sales Business Unit Manager.

Supervises
Sales Administration/Internal Sales staff.

Main activities
- Planning and directing the activities of a team of Sales Administration/Internal Sales staff, ensuring all staff provide optimal administrative support to allow the Sales Team to attain predetermined Sales targets.
- Implementing new and modified Sales Administration procedures, processes and reporting. Identifying and reporting to Management areas for process/procedural improvement.
- Providing administrative support to the production of weekly, monthly, quarterly and yearly Sales statistics including Sales budgets, Sales forecasts, Sales expenses and variance reports.
- Assisting with the maintenance and updating of the Sales Department manual that details all policies and procedures pertaining to the Sales Department.
- Overseeing the internal Sales process to ensure that all Sales inquiries and orders are being dealt with efficiently and effectively.
- Providing administrative support for the production of tenders, bids and other Sales related documents.
- Receiving inbound Sales orders, providing product information, advice and support to customers, and maintaining effective internal Sales and administrative procedures for the recording of all Sales transactions from receipt of order to dispatch and payment.
- Identifying Sales leads and escalating them to Sales Representatives. Ensuring the maintenance of the Sales database.
- Receiving and handling customer complaints escalated by members of the team and related to the sale of the organisation's products/services. Escalating unresolved complaints to Management.

Key skills
- Leadership, mentoring and communication skills.
- Attention to detail, analysis and problem solving capabilities.
- Excellent organisational, administrative and reporting skills.
- Sound product/service knowledge.

Internal contacts
Sales Management, Marketing staff, Finance and Administration staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts
Clients, Distributors, Suppliers, Government Bodies.

Typical experience
2-5 years of experience, coupled with administrative qualifications and may possess or be working towards tertiary qualifications.

Other comments

Position Description

Position title:	**Senior Sales Administrator/Internal Sales Representative**
Position code:	**FINFIN.SA.SSMF.3**
Level:	**3**

Responsible for

Receiving inbound Sales orders, providing product information, advice and support to customers, and maintaining effective internal Sales and administrative procedures for the recording of all Sales transactions from receipt of order to dispatch and payment.

Report to

Sales Administration/Internal Sales Manager, Sales Manager

Supervises

May supervise more junior sales administrators

Main activities

- Processing Sales orders and arranging the dispatch of products/services sold.
- Receiving inbound customer Sales inquiries and providing quotations, product/service information, support and pricing details in response to inbound enquiries, promoting the features and benefits of the organisation's products/services.
- Maintaining the customer database.
- Maintaining Sales statistics and records of sales performance.
- Providing administrative support for the production of tenders, bids and other Sales related documents.
- Identifying Sales leads and escalating them to Sales Representatives.
- Receiving, handling or escalating customer complaints related to the sale of the organisation's products/services.

Key skills

- Excellent organisational and administrative skills.
- Attention to detail.
- Excellent communication skills and a growing Sales focus.
- Sound product/service knowledge.

Internal contacts

Sales Management, Marketing staff, Finance and Administration staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

Typically 3 - 5+ years of experience.

Other comments

Position Description

Position title:	**Sales Administrator/Internal Sales Representative**
Position code:	**FINFIN.SA.SSMF.2**
Level:	**2**

Responsible for

Receiving inbound Sales orders, providing product information, advice and support to customers, and maintaining effective internal Sales and administrative procedures for the recording of all Sales transactions from receipt of order to dispatch and payment.

Report to

Sales Administration/Internal Sales Manager, Sales Manager.

Supervises

No supervisory responsibilities.

Main activities

- Processing Sales orders and arranging the dispatch of products/services sold.
- Receiving inbound customer Sales inquiries and providing quotations, product/service information, support and pricing details in response to inbound enquiries, promoting the features and benefits of the organisation's products/services.
- Maintaining the customer database.
- Maintaining Sales statistics and records of sales performance.
- Providing administrative support for the production of tenders, bids and other Sales related documents.
- Identifying Sales leads and escalating them to Sales Representatives.
- Receiving, handling or escalating customer complaints related to the sale of the organisation's products/services.

Key skills

- Excellent organisational and administrative skills.
- Attention to detail.
- Excellent communication skills and a growing Sales focus.
- Sound product/service knowledge.

Internal contacts

Sales Management, Marketing staff, Finance and Administration staff, Customer and Technical Support, Research and Development staff, Warehouse and Distribution staff.

External contacts

Clients, Distributors, Suppliers, Government Bodies.

Typical experience

Typically 2+ years of experience.

Other comments

Position Description

Position title:	**Head of Financial Advice - Multi-focus**
Position code:	**FINWMT.PS.FPCF.6**
Level:	**6**

Responsible for

Overseeing Financial Advisory Services across the network.Achieving the organisation's sales targets for financial advice and guidance to individual clients.

Report to

General Manager/Head of Retail Banking

Supervises

Financial Advice Team

Main activities

- Providing input to senior management on sales strategy, policies and objectives and business development for Financial Advice services embedded within the Branch network.
- Developing and managing the network of financial advisors by liaising with Retail Branch network staff.
- Developing business and product plans, setting sales and business development targets, monitoring and reporting on performance to senior management.
- Ensuring accurate reporting systems for management information, including commission payments and compliance.
- Ensuring up-to-date marketing, product and technical training and support for Financial Advisors, including risk management and legal/compliance issues.

Key skills

- Extensive experience in servicing clients and reviewing investment portfolios.
- Good communication skills, both written and verbal.
- Demonstrated strategic thinking and business development skills.
- . Strong negotiating, interpersonal and people-management skills.

Internal contacts

Branch network staff at all levels, Marketing, Technical, Product Development, Investment & Risk Management

External contacts

Individual clients, investment companies, industry associations

Typical experience

Requires 12 to 15+ years extensive experience in all aspects of investment and wealth management. Staff management experience is essential. Tertiary educational qualifications in finance. Professionally qualified Authorised Financial Advisor.

Other comments

Position Description

Position title:	**Practice Manager - Financial Advice - Multi-focus**
Position code:	**FINWMT.PS.FPCF.5**
Level:	**5**

Responsible for

Managing operational support services to provide optimal efficiency and cost effectiveness throughout the financial advisory service function.

Report to

Head of Financial Advice

Supervises

May supervise a support team.

Main activities

- Providing timely management information on the activities and outcomes of the Financial Advisory service within the Branch network.
- Providing assistance to the Head of Financial Advice to ensure timely identification and communication of issues to senior management.
- Optimising the efficiency and effectiveness of the Branch network's Financial Advisory services by developing and implementing training programmes, reporting systems and performance review mechanisms by liaising with internal departments such as Marketing, Product Development, Risk Management and Compliance.
- Ensuring that appropriate legal and statutory reporting requirements are carried out.
- Providing advice and recommendations to management and the Branch network on risk management issues which may affect the organisation (e.g. statutory obligations, ethics, confidentiality, security of people and systems, health and safety, insurance etc.)

Key skills

- Good understanding of Financial Advisory services systems and processes.
- Good communication and interpersonal skills.
- Project management and administrative skills.

Internal contacts

Branch network staff at all levels, Marketing, Technical, Product Development, Investment & Risk Management

External contacts

Suppliers, Government departments, industry associations

Typical experience

8-10+ years experience in sole-charge, senior operations role, preferably in banking industry. May have tertiary qualifications in administration, IT or finance.

Other comments

Position Description

Position title:	**Senior Financial Advisor - Multi-focus**
Position code:	**FINWMT.PS.FPCF.4**
Level:	**4**

Responsible for

Targeting and assisting clients to meet their financial objectives through the delivery of professional Financial Planning advice.

Report to

Head of Financial Advice or Practice Manager

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Introducing and developing new Financial Planning business in line with set targets. Coordinating, conducting and participating in sales promotions, campaigns and displays.
- Presenting investment/financial plans to clients in line with set targets.
- Increasing funds under management in line with set targets.
- Identifying, educating and promoting the Financial Planning concept to clients.
- Establishing and maintaining high compliance standards that satisfy legislative requirements.
- Developing networking relationships in order to enhance performance.
- Maintaining professional self development.

Key skills

- Experienced in servicing clients and reviewing investment portfolios.
- Good communication skills, both written and verbal.
- Demonstrated business development skills.
- Ability to work with minimum supervision.
- Ability to work to tight deadlines in order to achieve business outcomes.
- Experienced in delivering workshops and presentations.

Internal contacts

Financial Advisors, Client Relationship Managers, Para Planners.

External contacts

Clients.

Typical experience

At least 5+ years experience in Financial Planning advisory roles coupled with tertiary qualifications in Business, Finance or related discipline . AFA qualification.

Other comments

Position Description

Position title:	**Financial Advisor - Multi-Focus**
Position code:	**FINWMT.PS.FPCF.3**
Level:	**3**

Responsible for

Targeting and assisting clients to meet their financial objectives through the delivery of professional financial planning advice.

Report to

Head of Financial Advice or Practice Manager

Supervises

No formal supervisory responsibilities. May assist with the mentoring of other team members.

Main activities

- Introducing and developing new financial planning business in line with set targets.
- Reviewing and maintaining existing investment/financial plans for clients in line with set targets.
- Increasing funds under management in line with set targets.
- Identifying, educating and promoting the financial planning concept to clients.
- Establishing and maintaining high compliance standards that satisfy legislative requirements.
- Developing networking relationships in order to enhance performance.
- Maintaining professional self development.

Key skills

- Experienced in servicing clients and reviewing investment portfolios.
- Good communication skills, both written and verbal.
- Demonstrated business development skills.
- Ability to work under minimal supervision.
- Ability to work to tight deadlines in order to achieve business outcomes.
- Experienced in delivering workshops and presentations.

Internal contacts

Para planners.

External contacts

Clients.

Typical experience

At least 2+ years experience in Financial Planning advisory roles. Typically degree qualified in business, finance or related discipline. AFA qualifications.

Other comments

Position Description

Position title:	**Para Planner - Financial Advice - Multi-focus**
Position code:	**FINWMT.PS.FPPP.2**
Level:	**2**

Responsible for

Supporting Financial Planners in providing high quality financial planning services to both existing and new clients.

Report to

Senior Financial Advisor

Supervises

No supervisory responsibilities.

Main activities

- Reviewing and researching performance of investment products within client portfolios.
- Reviewing and researching individual client needs, investment strategies and risk profiles.
- Producing financial plans in line with agreed targets.
- Initiating and assimilating investment product research.
- Establishing and ensuring compliance standards associated with corporate law.
- Ensuring workflow standards such as turnaround response times are met.
- Participating in team tasks and projects as directed by Management.

Key skills

- A sound knowledge of social security, taxation, superannuation and investment products.
- Good communication skills, both written and verbal.
- Well developed numerical and analytical skills. Proficient in spreadsheet programs.
- Knowledge of ASIC, ISC and FPA compliance standards.
- Well developed organisational skills.
- Ability to work in a team environment with minimal supervision.

Internal contacts

Financial Planners.

External contacts

Clients, Fund Managers.

Typical experience

Must have previous experience in Financial Planning support, coupled with tertiary qualifications in business, finance or a related discipline. Completed or may be studying towards a AFA qualification.

Other comments