

# CTP Intermediary Underwriting Operations Officer

## Role Information

<b>Role Title:</b>	CTP Intermediary Underwriting Operations Officer		
<b>Business Unit/Function:</b>	Insurance Australia		
<b>Pay Band:</b>	Fixed Salary 3	<b>Location</b>	Brisbane or Sydney
<b>Leader Profile:</b>	Team Member		
<b>Role Reports to (role title):</b>	CTP Intermediary Underwriting Solutions Leader		
<b>Direct Reports (role titles):</b>	N/A		

## Team Member Accountabilities

To be achieved by all Team Members	
<ul style="list-style-type: none"> <li>Understands how to contribute to team, business and group priorities and drives priorities with a sense of purpose.</li> <li>Collaborates across and within teams and build strong relationships with customers to match the right solution to each customer's needs – placing the customer at the heart of decisions.</li> <li>Knows and clarifies what's expected, taking accountability to resolve problems and set high personal standards to deliver timely results in a changing environment.</li> <li>Builds strong relationships, works effectively in diverse and flexible teams, takes ownership for learning and development and takes action to enhance own and others' safety and wellbeing.</li> <li>Keeps things simple while driving innovation, removing blockages and anticipates and adapts to changing market and business challenges.</li> <li>Manages the quality of own data input and proactively helps identify risks and issues.</li> <li>Role model the Suncorp Values, Code of Conduct and Leader</li> </ul>	

<b>Prepared by:</b> (Name & position)	Kelly Kelly EM CTP Underwriting	<b>Date:</b>	13/06/16
<b>Approved by:</b> (Name & position)	Enter name Enter position title	<b>Date:</b>	Enter date

## Role Specification

### Objective of the Role

Work with a high performing team to provide support to CTP through delivering consistent specialist underwriting solutions across underwriting decisions, data integrity and Regulatory operations whilst meeting Group and Statutory compliance obligations.

The core focus of this role will be to :

- Ensure consistent underwriting decisions and solutions
- Ensure integrity of our scheme data
- Supporting intermediary operations relating to agent set-up, receipt and cash allocation and reporting.

### Key Accountabilities

#### Underwriting Solutions

- Develop deep knowledge of the national risk selection strategy that delivers profit and growth targets across each Scheme.
- Provide consistent advice and decisions to referred underwriting.
- Seek advice/input from Underwriters regarding complex technical decisions and issues.

#### Operational

- Responsible for Intermediary Agent creation, system access provision and maintenance of client records.
- Ensure intermediary payments are reconciled in the bank account, receipted and posted to policy records,
- Provision of Production Summary and Statement of Accounts to intermediaries
- Validation of Common Expiry Date (CED) Fleet policy creation.
- Monitoring of the Accounts email inbox and to respond to all work coming through in a timely manner.

#### Data Integrity

- Ensure a consistent approach to data quality across all schemes to support cross sell and regulatory reporting in the management of operational tasks relating to:
  - Error file
  - Outstanding cash/Unreconciled Policies
  - Regulatory and Transport Authority data exchange
  - Policy Diaries
  - Liaise with BT to fix system errors
  - GST
  - Advanced LSP Protect knowledge

#### Customer Experience

- Adopt a 'Customer First' focus in the delivery of internal /external services.
- Manage customer complaints.
- Sound knowledge of customer value proposition to ensure effective delivery and alignment for all CTP brands and schemes.

#### Relationship Management

- Build, enhance and maintain quality relationships with all internal and external customers.
- Knowledge at both a strategic and operational level of distribution, marketing and sponsorships.

#### Risk and Compliance

- Ensure compliance with Group and Statutory risk and compliance policy and procedures (including managing audits both external and internal, acting within Delegated level of authority, 100% compliance CBT on time).

- Provide accurate support to the Underwriting team for due diligence of the premium filing process.

#### **Deliver exceptional results in Operational Excellence**

- Ensure accurate recording of data for activities on the enlighten management system
- Achieve an efficiency target of 80% (or as directed by your Leader)
- Achieve a utilisation target of 80% (or as directed by your Leader)

#### **Teamwork**

- work closely with the CTP team members to ensure that all relevant intermediary related issues are dealt with in an efficient and effective manner
- engaging team members to facilitate performance of the required accounts processes and deal with escalations as required
- Active participation in team activities, constantly living the Suncorp values.

## **Person Specification**

### **Key job requirements**

**Qualifications** (indicate whether mandatory or desired)

- Certificate IV in Financial Services– desired

**Experience** (minimum type and level of experience required to perform the role)

At least 2 years experience in CTP insurance (mandatory), together with relevant qualifications

### **Key Capabilities/Technical Competencies (skills, knowledge, technical or specialist capabilities)**

- Analytical skills – ability to develop solutions and courses of action by using an information base to identify key issues, compare with other data and determine cause-effect relationships.
- Change management – ability to recognise, understand and support need for change and anticipated impact on both the team and self.
- Communication Skills – ability to convey and explain information, coherently and confidently both oral and written.
- Customer service – committed to delivering a quality differentiated experience to all customers.
- Strong negotiation skills – exploring opportunities with a view to mutual benefit and acceptance.
- Problem solving – ability to seek out information and break down problems and situations into simple lists of components.
- Time management skills – prioritisation of work without supervision.
- Adaptable and responsive to a continuously changing environment
- Working technical knowledge of National CTP Schemes however not the primary source of technical support for team members.
- Financial knowledge sufficient to interpret and analyse reports relevant to area of responsibility.
- Knowledge of underwriting, strategy and relationship management activities.
- Resilience - Responds calmly to frustrations, obstacles and opposition. Controls own emotions and responds to criticism in a constructive way, whilst keeping the objectives in mind.
- Self Development: The ability to assess and respond to requirements for continued development. It involves actively seeking to understand personal strengths and weaknesses and working continuously to improve.