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| Role Information | |  | | |
| **Role Title:** | | Customer Service & Underwriting Consultant | | |
| **Function:** | | Customer Marketplace | **Area** | GI Sales & Service |
| **Pay Band:** | | Base Salary A4 | **Employee Level** | Team Member |
| **Role Reports to (role title):** | | Team Leader or Team Manager, GI Sales & Service (various brands) | | |
| **Direct Reports:** | | N/A | | |
| Team Member Accountabilities | | | |
| **To be achieved by all Team Members** | | | |
| * Understands how to contribute to team, business and group priorities and drives priorities with a sense of purpose. * 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. * Knows and clarifies what’s expected, taking accountability to resolve problems and set high personal standards to deliver timely results in a changing environment. * Builds strong relationships, works effectively in diverse and flexible teams, takes ownership for learning and development and acts to enhance own and others’ safety and wellbeing. * Keeps things simple while driving innovation, removing blockages and anticipates and adapts to changing market and business challenges. * Manages the quality of own data input and proactively helps identify risks and issues. * Role model the Suncorp Our Compass Behaviours and Code of Conduct. | | | |

Role Specification

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| **Objective of the Role** |
| To be the first point of contact for our customers and partners for their personal insurance needs. Deliver ‘great’ customer experiences to customers and partners, through first point resolution in an effective and efficient manner across our brands by quoting, underwriting and processing all leads and enquires for both existing and new business. |
| **Key Accountabilities** |
| |  |  | | --- | --- | | **Customer Service and Resolution**   * Handle queries from customers and partners; resolve or escalate customer complaints; identify, resolve and/or escalate quoting, processing or underwriting issues to ensure the delivery of ‘great’ customer experiences. * Contribute to ensuring quality customer and partner relationships are established, enhanced and maintained through efficient and effective underwriting, maximising point of contact resolution. * Know our customers and partners and build strong relationships by matching the right solution to each customers’ needs.   **Underwriting and Risk Selection**   * Provide a customer focused and profitable underwriting solution for existing and new business in line with the Suncorp New Zealand underwriting guidelines. * Process quotes, new business, renewals, endorsements and cancellations in accordance with authority levels set out in your underwriting license to ensure the maintenance of profitable business and appropriate risk coverage for the customer. * Process payments and liaise with partners and customers regarding outstanding premiums and arrange for adjustments and policy cancellations where necessary.   **Conduct and Compliance**   * Ensure that risks are managed on a day-to-day basis by adhering to all Suncorp New Zealand processes and procedures and act in a way that supports and champions a risk culture within Suncorp New Zealand. * Adhere to the Suncorp Code of Conduct and relevant people policies including demonstrating Suncorp’s Compass behaviours by acting in a professional manner. * Take accountability for individual and team performance and be active in contributing to the team’s overall performance. |  | |
| **Key Stakeholder Relationships** |
| **Internal Relationships**   * Team Leader, Operational Underwriting * GI Sales & Service Leaders and Customer Service Consultants * Customer Marketplace Team * Insurance Solutions * Claims * Finance & Operations   **External Relationships**   * Customers * Partners |
| Person Specification |
| **Key Job Requirements** |
| **Qualifications** (indicate whether mandatory or desired)   * Professional insurance exams (desired) * Completed high school Mathematics and English studies (mandatory)   **Experience** (minimum type and level of experience required to perform the role)   * Customer service experience (mandatory) * Insurance industry experience (desired) |
| **Key Capabilities/Technical Competencies (skills, knowledge, technical or specialist capabilities)** |
| * Effective communication skills both verbal and written * Effective customer service skills * Excellent computer skills e.g. Excel, word. * High attention to detail * Organised and efficient * Ability to work in a fast-paced environment * Resilient |

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| **Prepared by:**  ***(Name & position)*** | Annabelle Thompson  EM GI Sales & Service | **Date:** | 15/04/2019 |
| **Approved by:**  ***(Name & position)*** | Campbell Mitchell  EGM – Customer Marketplace | **Date:** | 15/04/2019 |