

Position Description

Position Title	Member Relationship Consultant - Insurance Specialist
Department / Branch	Contact Centre
Reporting Relationships	Contact Centre Manager
Supervisory responsibilities	Nil
Classification	Award
Effective date	November 2024

Objective of the Role

The role is responsible for managing member relationships and providing high levels of customer service and an excellent member experience with a focus on meeting Member's needs through the provision of Insurance solutions. Accountable for new business generation, conversion of portfolio activities to outcomes, member retention and satisfaction.

General Responsibilities of Role

The responsibilities of this role include but are not limited to the below:

- Provide an exceptional standard of member service leveraging your excellent communication and listening skills in alignment with our brand and values.
- Adhere to and exceed quality assurance standards with a consistent high level of service whilst complying with policies and procedures within a face paced high volume Contact Centre environment
- Proactively develop and maintain a strong knowledge of products, services, processes and digital systems provided by Credit Union SA.
- Establish and enhance relationships with existing and potential to identify opportunities to meet members' needs.
- Liaise with Underwriters in all dealings in a professional manner ensuring that underwriting guidelines are adhered to.
- Deepen Member relationships by exploring opportunities for other Credit Union SA products and services.
- Ensure all Members' needs are completed and recorded in required CRM in a timely, accurate and professional manner at the end of each interaction
- Ensure a clear understanding of call and digital communication standards and service level requirements
- Lodge and where able to resolve any Member or non-member feedback in a timely and professional manner within Credit Union SA policy and legislative requirements.
- Assume responsibility of own targets, setting strategies to meet them by working closely with Manager/Leader to develop coaching and action plans.

Position Description

- Increase Members' knowledge of their membership through provision of information relating to Credit Union SA's products and services.
- Follow up Members in a timely manner through all distribution channels and proactively assess their needs to enhance their membership with Credit Union SA.

Other Job Related Information

The role requires taking ownership of day to day operational processes and ensure compliance with policy, procedures and legislative requirements.

Success will rely on working collaboratively and contributing to building a supportive and high performance environment.

Key Selection Criteria

Essential:

- Minimum 2 years demonstrated insurance sales and service experience.
- Excellent written and verbal communication skills.
- Ensure adherence to industry regulations, legal requirements, and company policies.
- Positive, proactive and results focused attitude and behaviour.
- High level of energy and enthusiasm, with a passion for excellence.
- Ability to create and build member relationships through curiosity and rapport building ensuring needs are identified and met
- Problem solving skills
- Negotiation and conflict resolution skills
- Time management skills
- Attention to detail
- Identify & prioritise opportunities
- Ability to link product service and benefits to member needs
- Demonstrate empathy when dealing with members and internal stakeholders
- Influencing skills

Desirable:

- Prior experience working within a Contact Centre