

## Position Description

<b>Position Title</b>	Member Relationship Consultant - Insurance Specialist
<b>Department / Branch</b>	Contact Centre
<b>Reporting Relationships</b>	Contact Centre Manager
<b>Supervisory responsibilities</b>	Nil
<b>Classification</b>	Award
<b>Effective date</b>	October 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 consistent with values of cross-sell and up-sell retention targets.
- 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:**

- Demonstrated Insurance sales and service experience
- 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
- Communication, Listening & Questioning Skills
- Customer/Member Service Skills
- Problem Solving Skills
- Negotiation/Conflict Resolution Skills
- Time Management Skills
- Ability to demonstrate high levels of data entry and minimal error rate.
- Attention to detail
- Identify & prioritise opportunities
- Ability to link product service and benefits to member needs
- Questioning and listening skills
- Clear and precise communication skills
- Questioning skills
- Closing – Assertiveness, urgency, negotiation
- Demonstrate empathy when dealing with members and internal stakeholders
- Influencing skills

### **Desirable:**

- Prior experience working within a Contact Centre