



POSITION DESCRIPTION AXA NZ

(Version 1.0 Created 06/2008)

POSITION TITLE:	Senior Financial Protection Administrator	Last Modified <i>29 October 2009</i>
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Functional Unit:	Marketing	Division/Team:	Financial Protection
POSITION CODE: <i>(completed by HR)</i>		PACKAGED: <i>(completed by HR)</i>	
PURPOSE OF POSITION:	<p>The purpose of this position is to work with the Key Account Manager to ensure solid and ongoing relationships with designated intermediaries. You will achieve this by providing exceptional customer service and excellent administrative quality.</p> <p>The key competencies of this role will include:</p> <ul style="list-style-type: none"> A strong customer focus A strong focus on team work Effective and confident communication skills – written and verbal Excellent time management Innovative and solution driven 		
REPORTING TO (POSITION TITLE):	DIRECT	INDIRECT	
	<ul style="list-style-type: none"> Key Account Manager 	<ul style="list-style-type: none"> Business Markets Manager 	
NO. OF REPORTS:	DIRECT	INDIRECT	
KEY RESPONSIBILITIES: <i>(include financial responsibilities)</i>	<p>Provide support to the Key Account Manager in creating solid ongoing relationships with designated intermediaries and in becoming an integral part of the team that provides a main contact point for all Group Insurance interactions.</p> <p>Ensure administrative quality and adherence to specified KPI's and ensure consistent level of service and support to the immediate Group insurance team and wider business.</p> <p>Train and coach other less experienced members of the team to ensure administrative quality and adherence to systems and processes are maintained to a high standard.</p> <p>Draft routine correspondence and highlight priorities to the business.</p> <p>Be able to confidently explain product functionality to AXA Group insurance team.</p> <p>Suggestions and implementation of process improvements.</p> <p>Work effectively within team environment by sharing information with colleagues and supporting team to ensure quality standards are met.</p> <p>Develop and maintain in-depth specialist knowledge of AXA financial protection products and services and the legislative, technical industry and organisational environment in which they operate.</p>		

	<p>Analyse each query, or request (ask appropriate questions etc) to understand internal and external client needs.</p> <p>This role will aid the Key Account Manager in focusing on end to end cycle time and process efficiencies which will be critical to the delivery of AXA's group insurance proposition.</p> <p>Other key responsibilities of this role will include:</p> <ul style="list-style-type: none"> • Reviews: broker completed, termination, establishment and annual • Commission and admin fee payments • Underwriting assessments • Continuation options • Claims • Receipt of premiums • Premium arrear chasing • New and discontinued member processing • Reporting • Managing team portfolio, work list, RIPA updates, emails, phone calls and WMS • Other tasks as required by management 					
<p>KEY MEASURES: <i>(include financial targets)</i></p>	<ul style="list-style-type: none"> • Meeting specified KPI's • Delivery of specified tasks within timeframes • Increasing operational efficiency, deliver enhanced processes and procedures • Scorecard key performance indicators (as agreed with manager) • Quality checking and monitoring, reporting • Building relationships with customers • Assist in resolving queries and complaints 					
<p>DECISION MAKING RESPONSIBILITY:</p>	<ul style="list-style-type: none"> • Within delegated authority limits 					
<p>KEY INTERNAL & EXTERNAL CUSTOMERS:</p>	<table border="1"> <thead> <tr> <th data-bbox="419 1115 986 1155">KEY CUSTOMER</th> <th data-bbox="986 1115 1522 1155">PURPOSE OF RELATIONSHIP</th> </tr> </thead> <tbody> <tr> <td data-bbox="419 1155 986 1507"> <p><u>External</u></p> <ul style="list-style-type: none"> • Group Insurance Intermediaries <p><u>Internal</u></p> <ul style="list-style-type: none"> • Market Manager Financial Protection • Group Business Development Manager • Key Account Manager • Product Managers • Claims and Underwriting • Actuarial Team </td> <td data-bbox="986 1155 1522 1507"> <ul style="list-style-type: none"> • Represent AXA as preferred Group Provider, through excellent service delivery </td> </tr> </tbody> </table>	KEY CUSTOMER	PURPOSE OF RELATIONSHIP	<p><u>External</u></p> <ul style="list-style-type: none"> • Group Insurance Intermediaries <p><u>Internal</u></p> <ul style="list-style-type: none"> • Market Manager Financial Protection • Group Business Development Manager • Key Account Manager • Product Managers • Claims and Underwriting • Actuarial Team 	<ul style="list-style-type: none"> • Represent AXA as preferred Group Provider, through excellent service delivery 	
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<p>ORGANISATIONAL COMPETENCIES:</p>	<ul style="list-style-type: none"> • Relating and networking – builds wide and effective relationships inside and outside the company. • Strong communication and administrative skills. Adapts verbal and communicative skills to match client's needs and communicates confidently. • Ability to problem solve- probes to fully understand issues and seeks to provide resolution by escalating queries, issues as appropriate. • Demonstrates AXA's core values (attentive, reliable and available) in all areas of the role. 					
<p>EXPERIENCE & QUALIFICATIONS:</p>	<ul style="list-style-type: none"> • Strong analytical and mathematical skills • 2to 3 years experience in the financial services industry • Strong knowledge of Microsoft Excel and Word • Able to clearly communicate information and ideas when dealing with team members and clients (internal and external) • Sound understanding of insurance products and markets 					

**LEADERSHIP
LEVEL:
SELF LEADERSHIP**

LEADERSHIP BEHAVIOURS FOR SELF LEADERSHIP LEVEL:

BUILD TO GROW

Strategic vision

- Understands operational expectations for own role and team
- Initiates action in order to achieve agreed goals
- Demonstrates knowledge of AXA products and services related to own role

Building capability

- Recognises areas for self improvement
- Takes accountability to actively seek development opportunities that will contribute to high performance

FOCUS ON CUSTOMER

- Has an understanding of the competitors and the industry
- Meets and strives to exceed internal and external customer requirements
- Adjusts work priorities to achieve customer needs
- Takes accountability for customer needs and builds rapport with customer

CATALYSE HIGH PERFORMANCE

Team leadership

- Contributes to and supports the achievement of team goals
- Takes accountability to achieve agreed goals within timeframe required
- Understands the responsibilities of team and how role relates with team members and other teams

Change leadership

- Supports and understands organisational decisions and change
- Positively accepts change

SHARE TO SUCCEED

- Actively assists team members and supports other teams where possible
- Accepts individual differences
- Seeks to contribute to team discussion and support outcomes
- Readily shares information with others at the time of receiving knowledge

LEAD THROUGH ACTIONS

Results orientation

- Strives for high performance
- Identifies problems and strives to understand primary cause
- Identifies areas for improvement that can support high performance

Living through AXA values

- Understands and supports AXA values