



POSITION DESCRIPTION

POSITION	Technical Assistant, Commercial Lines	
	Title	Technical Assistant, Commercial Lines
ORGANIZATION INFORMATION	Department(s)	Commercial Lines
	Reports to:	Director of Commercial Lines
	Supports:	Branch Manager, President, Vice Presidents
	Reporting Positions	N/A
	# of Direct Reports	1
GENERAL SUMMARY	Assist the Commercial Lines Department in achieving service level objectives as needed. Support the Commercial Lines Team in providing exceptional service to new and existing clients. Verify product efficiency and performance to ensure quality outputs.	
DUTIES and RESPONSIBILITIES	<p>General Duties:</p> <ul style="list-style-type: none"> • Draft standard letters to customers • Data entry in Power Broker, Policy Works and company portals • Process renewals, new policies and endorsements • Open, stamp and sort incoming mail • Prepare and post outgoing mail • Answer phones and transfer calls to employees • Organize and retrieve files • Invoice premium amounts when applicable • Enter policy changes/cancellations in company websites/portals • Print documents received online from insurance companies • Send correction requests to insurance companies as needed • Verify customers qualify for various coverages, contact client, and add coverages where applicable • Arrange applications, submissions and proposals as directed • Scan and attach documents when needed • Assist team members by offering clerical support • Perform account transactions • Reception relief as necessary • Maintain client files and update information as needed • Other duties as assigned 	
SUPERVISORY RESPONSIBILITIES	N/A	
FINANCIAL RESPONSIBILITIES	N/A	



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COMMUNICATION		Corporation/Department	
	External	<ul style="list-style-type: none"> • Salespersons • Business Representatives • Contractors / Suppliers / Insurer Representatives 	
		Department/Position	
	Internal	<ul style="list-style-type: none"> • All employees 	
JOB REQUIREMENTS	Education Level	High School Diploma	
	Computer Skills	<ul style="list-style-type: none"> • Data search and entry • Create and modify written correspondence and documents • Data entry to company portals • Use of specialized management system software (Power Broker)(Policy Works) • MS Office Applications 	
	Key Knowledge, Skills and Abilities	<ul style="list-style-type: none"> • Excellent oral, written and interpersonal communication skills • Reading and comprehension of insurance wording and company manuals • Mathematical skills (calculate percentages, ratios, averages and premium rates) • Detail oriented • Time management and organizational skills • Ability to multitask and prioritize work assignments 	
	Professional Experience	1 year of administrative and/or broker support experience	
	Working Conditions	Office Environment	
COMPETENCIES	<p>Teamwork and co-operation</p> <p>ONA team members collaborate and work together with a constructive attitude, as opposed to working individually or competitively. They demonstrate growing capabilities, perfecting interpersonal skills and promoting team contributions when interacting with dignity and respect with colleagues.</p>		



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Continuous learning and improvement

ONA team members proactively seek opportunities to develop new capabilities, skills, and knowledge to support the business. This involves identifying and addressing individual strengths and weaknesses, areas for improvement and developmental needs. ONA is committed to a culture of continuous learning and improvement enabling teams to reach their full potential. ONA attains maximum effectiveness and a healthy spread of expertise at all levels.

Listening, understanding and responding

ONA team members make use of effective interpersonal skills including listening, understanding and responding to address diverse opinions from clients, colleagues and partners. This increases the effectiveness of giving and receiving insightful and constructive feedback. These behaviours promote a culture of knowledge sharing, openness, and readiness to accept and embrace continuous learning and improvement.

Client Service Focus

ONA team members promote the image of the company by exceeding customer expectations. The team ensures that promises are kept and service is delivered, developing trust, respect, satisfaction and loyalty. ONA team members think about the client's needs first and foremost.

Integrity

ONA team members have high standards of principles, values, ethics and moral conduct. Business is carried out in fairness, transparency and honesty respecting all cultures and requirements. It implies that one's behaviour is consistent with ONA's values, instilling trust and making sure that teams honour their commitments, in expression and action.

Accepts Responsibility

ONA team members come forward and share responsibility and accountability to own, drive and achieve business objectives tied to long term goals. ONA team members lead by example empowering others to take on additional responsibilities and work, according to accepted levels of risk in achieving positive business outcomes.

Organizational Commitment

ONA team members align their behaviour with the needs, priorities and goals



**Oegema,
Nicholson**
& Associates Insurance Brokers Ltd.

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of ONA. This involves team members being fully committed to reaching business goals. It includes having the drive, and passion within ONA's operations, structure and culture to achieve desired results.

Initiative

ONA team members identify what needs to be done and take voluntary and independent actions to accomplish objectives and create opportunities. They proactively think ahead and do more than is required. Team members plan work and exceed job expectations. This includes the ability to identify concerns and respond to situations as they arise with minimal supervision. ONA teams think of solutions in advance whenever possible.