



POSITION DESCRIPTION

POSITION	Technical Assistant, Personal Lines	
	Title	Technical Assistant, Personal Lines
ORGANIZATION INFORMATION	Department(s)	Personal Lines
	Reports to:	Branch Manager and/or Personal Lines D
	Supports:	Branch Manager, Director of Commercial Lines, President, Vice Presidents
	Reporting Positions	N/A
	# of Direct Reports	1
GENERAL SUMMARY	Assist the Personal Lines Department in achieving service level objectives as needed. Support the Personal 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 and company portals • Process renewals, new policies and endorsements • Home evaluators • EDOCS – sorting/printing documents • Telephone reception • 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	External	Corporation/Department	
	Internal	Department/Position	
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) 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><u>Encourages Participation:</u> Proactively looks for solutions by involving others to resolve issues. Readily supports, provides ideas and encourages two-way feedback. Actively checks for understanding when communicating with colleagues. Encourages team and promotes team accomplishments.</p> <p>Continuous learning and improvement</p> <p><u>Seeks Learning Opportunities:</u> Actively pursues technical and behavioural self-development on an ongoing basis. Sets challenging goals and standards of excellence. Demonstrates keen interest to learn and gets involved in tasks that allow for the development of skills and abilities.</p>		



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Listening, understanding and responding

Demonstrates Excellent Listening Skills: Exhibits patience and respect for other people when sharing their experience and knowledge. Checks for understanding with listeners to verify comprehension, normally avoiding miscommunication. Accepts and implements feedback for improvement. Expresses thoughts and ideas in a clear and succinct manner. Is always courteous and professional when reacting to others.

Client Service Focus

Understands and Meets Customer Needs: Proactively looks for pertinent information on the underlying needs of the customer and recommends appropriate actions. Monitors customer follow ups closely and provides regular updates on progress. Actively promotes stronger client relationships based on ONA values. Consistently and respectfully checks for understanding with customers when resolving concerns, complaints or queries.

Integrity

Encourages Integrity & Ethics: Recommends solutions that win the trust and support of others. Promotes trust, transparency and encourages confidence in others. Creates an environment filled with honesty, accountability and the pursuit of aligned objectives.

Accepts Responsibility

Clarifies Objectives, Deliverables and Responsibility: Clarifies expectations before accepting tasks and responsibilities. Seeks clear background and rationale before attending to a task. Makes use of effective techniques and methods to develop the most appropriate solutions.

Organizational Commitment

Actively Supports ONA's Work Culture: Actively supports ONA's Mission, Vision, Values and business goals. Effectively uses both formal and informal channels to acquire information, assistance and accomplishing quality work.



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	<p>Initiative</p> <p><u>Addresses Issues and Takes Independent Actions:</u> Volunteers to tackle challenging tasks that stretch his or her capabilities. Able to work independently and takes immediate action when confronted with a new situation.</p>
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Prepared by	Date	Revision No	Revision Date	Approved by
ENGAGE HR™	April 4 th , 2016	1	April 1 st , 2016	JO