



Member Support - Sales

Reporting to: Manager, Member Support - Sales
Business Unit: Sales
Date Last Reviewed: June 2019

About MAS

At MAS, we exist to protect what matters in our Members' worlds and our vision is to develop life-long Members through life-long trust. We want to be the number one provider of insurance and wealth management solutions in every professional market we serve. We will achieve this by offering fast, reliable and Member-centric solutions through convenient and cost-effective channels.

Set up as a Mutual in 1921 by Doctors, MAS has been looking after NZ professionals with insurance and investments for nearly 100 years, and today we're trusted by more than 33,000 Members from a range of professional sectors.

We're in an exciting period of change as we commit to doing what we can for our Members, their families and future generations of New Zealanders, which means our staff need to be highly motivated with lots of energy. We have a new visual identity, new purpose, and we're implementing a range of projects and initiatives to ensure we're around for another 100 years.

Sales overview

The Sales team is responsible for providing sales and service to existing and prospective MAS Members. This function is delivered internally through Internal Sales team for our General Insurance products and externally our regional advisers deliver our Life and Disability and Funds Management offerings. Particular functions include:

1. Providing information and advice about MAS's products and services – specifically personal insurance, investments and superannuation, and banking relationships.
2. Actively seeking new MAS Members, with a focus on building and maintaining relationships.
3. Maintaining and strengthening relationships with existing MAS Members and continuing to fulfil their requirements for financial advice in relation to Life, Disability and Retirement Planning products and services.
4. Supporting promotional and sponsorship events.
5. Providing advice and having input into projects led by other MAS business units that have a bearing on Members' experiences with MAS.

Position purpose

A Member Support - Sales team member is accountable for a range of tasks that support our Members and their needs. Member interactions are mainly initiated/achieved by phone (inbound

and outbound conversations), emails (internal and external), tasks (internal), campaigns (proactive) and any other avenues that create member interactions.

MAS is an ever-changing business to ensure our success and to be there for our Members in their time of need. Our Member Support - Sales team members are resilient and adaptable to the changing horizon of our business and our Member's needs.

Role Specific

Member Interactions

All interactions must be achieved with exceptional service/sales ethic in mind. It must be at all times professional, empathetic, timely and knowledgeable. There must be added value in each interaction to build relationships, build business and to ensure that Members are protected in Life, Personal Assets, Investment, and Business. Tasks include, but are not exclusive to:

- Answering queries and adding value (creating opportunity) through inbound phone queue, emails, tasks through SAGE, face to face contact, outbound calling (proactive calling campaigns or requests to call) and centralised inbox/task box
 - Identifying opportunities in each interaction to ensure that members are correctly and fully protected, and to promote the relationship with our MAS Adviser force MAS Partnerships (Creating referrals and appointments for our Advisers or MAS Partnerships)
 - Being available for Member interactions via our 0800 queue daily as it is rostered or as required
 - Proactively outbound calling. For example, Marketing campaigns,
 - Updating Member contact details and signing to correct region.
 - On-boarding new Members over the phone that fit MAS membership criteria within agreed Service Level Agreements
 - Following up on quotes and membership within agreed Service Level Agreements.
 - Answering general queries from our Members
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- Providing timely, accurate quotes of GIS products
 - Making effective Underwriting decisions within personal Delegated Authority Level that protects our Members and the MAS business in relation to risk
 - Delivering and executing Mid Term Adjustments through MAS Systems or, where applicable, by tasking to GIS if outside of personal delegated authority.
 - Issuing policies, once accepted by Member
 - Following up on quotes within agreed Service Level Agreements
 - Responding to general product enquiries from Members
 - Lodging claims in SAGE and following the correct claims procedure to ensure a great experience for our Members
 - Following up with Members on any outstanding GIS quotes
 - Scanning and setting up doc sets in SPICE and setting up tasks to the Life team
 - Answering queries in relation to Kiwisaver or RSP (and any future investment products) in a timely manner
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- Sending investment forms to Members or to the Internal Business Unit to process (including switch or withdrawal forms) within agreed timeframes

- Assisting Members with First Home Withdrawal requests and, at every opportunity, promoting Life and Income Cover as well as the benefits of meeting with the MAS Adviser team (to obtain referrals)
- Lodging any feedback in SAGE and ensuring that it is tasked to the appropriate area/person as required
- Correctly allocating tasks to other business units
- Following up on tasks, quotes and membership acceptance/approvals
- Any other tasks that may arise due to the needs of the business.

Competencies:

These are the competencies, which a Member Support - Sales team member is expected to display and against which their performance will be measured:

Builds quality relationships

Works to develop and maintain quality relationships with internal and external contacts.

Requirements of this role:

- Teamwork and relationship building skills
- Excellent interpersonal communication skills
- An ability to build rapport with Members
- An ability to prioritise work in this busy environment
- The drive to want to help other business units succeed when required.

Provide “Go Beyond” Service

Is strongly committed to providing “Go Beyond” service to internal and external contacts.

Requirements of this role are:

- Strong Work Ethic
- Ability to have Add Value Conversations and can create/identify opportunity and act upon this opportunity
- Identify Go Beyond Service and deliver consistently on this mantra

Technically and judgmentally sound

Demonstrates an appropriate level of technical knowledge and sound decision making.

Requirements of this role:

- Good computer literacy
- Proven on the job training skills
- Good planning and organisational skills
- Proven ability to be able to adapt to change
- Proven ability to communicate well (verbally and written)
- Proven ability to have effective Add Value conversations
- Learn & maintain required Delegated Authority Levels
- Ability to multitask and can cope at the times we are working under pressure
- Knowledge of how to Underwrite in GIS products

Focused on improvement and innovation

Strives to identify and implement ways to improve MAS and themselves. Requirements of this role:

- A positive attitude.
- An ability to focus on key issues.
- To identify opportunities to improve process efficiency

Self-management

Maintains the types of attitudes and behaviours that will impact most positively on MAS’s future success. Requirements of this role:

- An ability to self-motivate and work without supervision.
- An ability to work effectively under pressure.
- A proven ability to keep knowledge current with all of MAS's products.

In addition, this role will have specific performance objectives, which are set and assessed on a regular basis.

Working relationships

Responsible to: Manager, Member Support - Sales
Responsible for: Nil.

Internal

- General Manager, Sales
- Regional Managers.
- MSC Manager and Team Leaders
- Advisers
- Head Office Teams
- Member Support Centre
- MSS

External

- MAS Members
- Service providers, Assessors
- Business Industry Associates

Delegations

Delegations are as outlined in MAS Delegation policies, which are available on MAS's intranet and subject to change at any time.

Other details

Positions in Medical Assurance Society may change over time as the organisation develops. We are committed to maintaining a flexible organisation structure that enables us to meet changing market and Member needs. Therefore, responsibilities for this position may change over time as the job evolves.