



Branch Manager– Position Description

PURPOSE OF THE POSITION

The Branch Manger’s primary role is to provide supervision of the Team Leads (TLs) Insurance Advisors (IAs) and Auto Agents (AAs) within the branch office. The secondary role is to act as the senior Insurance Advisor within the branch.

SCOPE OF POSITION

The Branch Manger reports to a Personal Lines Sales Manager and has functional relationships with other managers and staff within the company.

POSITION DUTIES

- Supervises and coordinates the activities of the TLs, IAs & AAs;
- Observes and evaluates the performance of the TLs, IAs & AAs on regular basis;
- Addresses TL, IA & AA performance issues;
- Communicates with other offices and personnel to resolve problems and expedite work;
- Interprets and communicates work procedures and company policies to staff;
- Reviews and checks the work of TLs, IAs & AAs for accuracy and content;
- Signs off on all new applications for Lloyds’ in-house program applications;
- Makes recommendations to management concerning staff and improvements to procedures;
- Coaches TLs, IAs and AAs to fully develop within their roles; identifies training needs, and provides solutions;
- Resolves TL, IA & AA staff and customer complaints;
- Ensures staff schedules are designed to ensure maximum coverage with minimum disruption;
- Organizes, plans, and prioritizes the work of TLs, IAs & AAs;
- Keeps insurance license current by maintaining required continuing education credits, and maintains compliance with all Insurance Act provisions;
- Performs all functions of the IA position in addition to supervisory duties;
- Carries out other duties essential to the position as directed by their supervisor.

KNOWLEDGE, SKILLS, AND ABILITIES

The incumbent must have proficient knowledge in the following areas:

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|-------------------------------------------------------|---------------------------|
| ✓ All lines of Personal Insurance offered by SeaFirst | ✓ ICBC Insurance |
| ✓ Management & coaching | ✓ Clerical |
| ✓ Customer service | ✓ Education & training |
| ✓ Personnel & Human Resources | ✓ English language |
| | ✓ Basic accounting & math |

The incumbent must demonstrate the following skills:

- ✓ Analytical and problem-solving skills
- ✓ Decision making skills
- ✓ Organizational and planning skills
- ✓ Valid BC Drivers license class 5
- ✓ Stress management skills
- ✓ Time management skills
- ✓ Effective verbal, presentation, and listening communication skills.
- ✓ Effective written communication skills
- ✓ Computer skills, including the ability to operate all software used at the firm

The incumbent must demonstrate the following abilities:

- ✓ Honesty and trustworthiness
- ✓ Respectfulness
- ✓ Reliability
- ✓ Ability to work collaboratively
- ✓ Cultural awareness and sensitivity
- ✓ Flexibility

WORKING CONDITIONS

The incumbent will be based out of one office but may occasionally be expected to travel to any of the other offices. Hours of work will fall into the office's opening hours, however not earlier than 8:00 am, nor later than 5:30 pm, Monday through Friday.

COMPETENCIES FOR THIS POSITION

1. **JOB KNOWLEDGE AND WORK QUALITY** – *Standard: Provides accurate, thorough, and professional work regularly within the time allocated; follows through with work and follows up appropriately; well-informed and cross-trained; follows established procedures in each aspect of job; understands the importance of the role and responsibilities in achieving company objectives.*
2. **ACCOUNTABILITY AND ADAPTABILITY** – *Standard: Takes responsibility for assigned tasks and projects; dependable and consistent completion; quickly acknowledges and corrects errors; is honest in all transactions; has consistent attendance and punctuality; adapts to changes; accepts and acts on constructive feedback.*
3. **PROFESSIONALISM** – *Standard: Daily interactions, behaviour, attitude, and communication reinforce a high level of productivity, autonomy, trust and respect for co-workers; handles potential conflict by speaking respectfully to the other person.*
4. **LEARNING & INITIATIVE** – *Standard: Seeks out & applies new knowledge; asks others for clarification and assistance when needed; actively determines the needs of the workplace; brings forward ideas to improve performance and further the business.*

5. **ANALYSIS & JUDGEMENT** – *Standard: Analyses problems skillfully; uses logic and good judgment to reach solutions; seeks and offers assistance as needed; maintains privacy; shares sensitive information with appropriate parties.*
6. **COMMUNICATION** – *Standard: Communicates knowledge clearly, accurately, and thoroughly; listens attentively, clarifies and responds thoughtfully.*
7. **TEAMWORK & INTERPERSONAL SKILLS** – *Standard: Co-ordinates own work with others; seeks opinions and encourages open lines of communication; values working relationships and diversity; works well with others; is reliable and can be counted on.*
8. **SALES AND SERVICE ORIENTED** – *Standard: Regularly seeks to provide quality service and promote value-add products, contributing to the company achieving excellent levels of sales and customer satisfaction.*
9. **BUSINESS PROCESSES** – *Standard: Conducts business process reviews of existing systems, processes, and controls within the organization (identifies, recommends, and evaluates enhancements, including policy, program, and process changes to effect cost containment and/or productivity improvements).*
10. **CHANGE MANAGEMENT** – *Standard: Manages change in the organization caused by internal and external factors (continuous process); communicates need for changes in the way things are done (encourages innovation, explains reasons for planned organizational or procedural changes, provides support for changes).*
11. **BUSINESS PLANNING** – *Standard: Plans and manages projects; analyzes and evaluates results and information from business activities and processes against objectives and benchmarks and advises on further action.*
12. **RESULTS ORIENTATION** – *Standard: Motivates and empowers high-performance individuals and teams to achieve goals and objectives.*
13. **PERFORMANCE MANAGEMENT** – *Standard: aligns organizational goals and objectives with individual and team goals using a performance management system; evaluates performance of individuals and teams and provides timely and constructive feedback; provides career planning, coaching, training, and development opportunities to facilitate staff retention and succession planning.*