

Training & Development Specialist

PURPOSE

The Training & Development Coordinator provides direct support to new and existing staff members with the goal of facilitating onboarding, training, and continuing education in response to dynamic market conditions.

SCOPE

The Training & Development Coordinator reports to the Personal Lines Manager and has functional relationships with other managers, supervisors, and staff within the company.

POSITION DUTIES

Employee Training and Development

- Conduct training sessions for new and existing employees on insurance products, sales techniques, and company procedures.
- Implement training programs tailored to the needs of various departments, including sales, customer service, and claims processing.
- Provide ongoing support and coaching to employees to enhance their understanding and performance.
- Analyze training data and feedback to identify areas for improvement and make necessary adjustments.
- Monitor employee performance and provide recommendations for additional training or development opportunities.
- Perform regular audits of client files for quality-assurance, and to ensure compliance with regulations and company procedures.
- Stay up-to-date with industry trends, regulatory changes, and best practices in insurance training.
- Maintain relationships with outside market personnel, in support of the training and continuing education of all staff members;
- Carry out other duties essential to the position as directed by their supervisor.

Training Material Development

- Create comprehensive training materials, including manuals, presentations, videos, and online modules.
- Regularly update training materials to reflect changes in insurance products, regulations, and company policies; ensure that all training programs and materials comply with industry standards and regulatory requirements.
- Collaborate with subject matter experts to ensure accuracy and relevance of training content.
- Develop and implement assessment tools to measure the effectiveness of training programs.

Employee Onboarding

- Coordinate and facilitate the onboarding process for new hires, ensuring a smooth transition into their roles.
- Conduct orientation sessions to introduce new employees to company policies, procedures, and culture.

KNOWLEDGE, SKILLS, AND ABILITIES

The incumbent must have proficient knowledge in the following areas:

- Applied EPIC
- Microsoft Suite including Sharepoint and Teams
- In-depth knowledge of insurance products, underwriting processes, and industry regulations.

The incumbent must demonstrate the following skills:

- Effective verbal, presentation, writing and listening communication skills
- Strong presentation and facilitation skills, with the ability to engage and motivate adult learners
- Time management skills
- Strong problem solving skills
- Excellent organizational and planning skills
- Computer skills, including the ability to operate all software used at the firm
- Valid BC Drivers licence class 5

The incumbent must demonstrate the following abilities:

- Honesty and trustworthiness
- Respectfulness
- Reliability
- Flexibility
- Ability to work both independently and collaboratively in a fast-paced environment
- Cultural awareness and sensitivity

WORKING CONDITIONS

The incumbent will be based out of the Brentwood Bay office but will 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.

Occasionally, an opportunity may arise to work overtime hours. All overtime must be pre-approved by the Personal Lines Manager. Unauthorized overtime is not permitted and will not be compensated.

POSITION COMPETENCIES

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-trainer; 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, behaviours, 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 judgement 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 & 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.*