

JOB POSTING TEMPLATE

Date: 2020

Function: Client Services

Job title: Senior/ Intermediate Specialist,
New Business

Manager title: Manager, New Business

Job purpose

The New Business Specialist will provide a range of administrative services in support of agency sales. This will be part of a high energy team with a passion for delivering excellent and reliable service to Sun Life sales associates and clients.

Major accountabilities

- Handle the administration of new business applications using Ingenium and other system applications.
- Review and ensure applications documents/ member-related information are complete and premium is matching the illustration/Quotation, seek clarification when needed.
- Clear Admin and Encode application details including rider information/ member information with 100% accuracy and within agreed turnaround time.
- Arrange for required premiums to be paid, ensure accurate billing and allocation of premium/ contribution on the system.
- Correspond with Sales on required policy or member information, as needed.
- Prepare application files for hand-over to Underwriters. Correspond with Sales on required underwriting information, as delegated.
- Monitor daily pending applications and ensure follow-up is in order as per agreed guidelines and inform the underwriter
- Follow Binding policy kit and deliver to branch timely by Out Sourcing.
- Efficient stock control allows NB to have the right amount of stock in the right place at the right time. It ensures that capital is not tied up unnecessarily, and protects production if problems arise with the supply chain.
- Report production issues promptly following the Incident Reporting Process.
- Perform other new business functions as assigned, i.e. payment to clinics for medical requirements ensuring the billed amount matches the requirements, policy kit assembly ensuring policy summary details match the system information, processing refunds for reject and cancelled policies, follow-up overdue acknowledgment receipts and push up to ensure the return is within turnaround time.
- Attends NB testing for new products, system enhancements to make sure projects complete timely and good results
- Attend the training to junior and new comer
- Makes NB reports to follow up NB metrics and control risk, quality and service.

Specialized knowledge

Job Specific Knowledge/Competencies:

- Proven ability to work in fast-paced environment with fluctuating work volumes
- Customer orientation
- Ability to communicate effectively in writing and on the phone, analytical thinker and detail-oriented
- Team player with a positive attitude towards and the ability to instill that in others
- Able to multi-task and prioritize, organize own work to meet agreed upon deadlines
- Adaptable: display a positive attitude towards change and adjust quickly and confidently to new circumstances and routines
- Ability to solve problems and suggest improvements to existing processes and practices
- Knowledge of insurance products
- Knowledge of insurance system (Ingenium), CPMS and SMS
- Proficient computer skills (Excel, Word)

Notes/ Unique Requirements:

- Overtime may be required
- Basic math, windows and typing test are required

JOB POSTING TEMPLATE

Education and experience

Education:

Minimum College graduate

Desirable

- Fellow Life Office Management, Inc.
- Associate, Customer Service

Experience

At least 2 years new business/pension experience combined

Communication scope

- Ability to communicate effectively in writing and on the phone
- Team player with a positive attitude towards and the ability to instill that in others