

JOB DESCRIPTION

PURPOSE



- **To ensure that each employee has a comprehensive description of their role, accountabilities, responsibilities and required job skills as they relate to the corporate goals and strategic plan.**

USES



- **Employee information - expectations of the job**
- **Hiring tool - skill requirements**
- **Communication - career progress**
- **Job evaluation - compensation**

JOB CLASSIFICATIONS



- **Jobs are not based on:**

- volume of work
- quality of work
- value of employee to organization
- length of service

- **Jobs are based on:**

- ☑ kind of work performed
- ☑ level of difficulty and responsibility of work performed
- ☑ Knowledge, skill and abilities required

DEGREE AND POINTS



- **Not all similar jobs have same level of authority:**
 - **Number of staff (0 - 20)**
 - **Size of budget**
 - **Level of accountability and decision**
- **Each responsibility, accountability, etc is assigned a degree level**
- **Each degree level is assigned points**
- **Points totaled up determine job grade and related pay scale**

PROCESS



- Employee completes the form
- Share and compare with similar positions
- Management reviews
- Employee and Manager discuss
- HR reviews for completeness and language
- Whenever possible HR consolidated
- Management reviews and sign-off
- Job evaluation

UPDATED



- January 31 - Goal setting
- Job requirements change
- New hires - current description
- New positions - reference

SIMILAR RESPONSIBILITIES



- Consolidate: one comprehensive job description
- *Example:*
 - *Secretary identical responsibilities for each office (type reports, monitor budget, travel arrangements, office management, reception, customer relations, troubleshoot)*

KEY WORDS



- Important: use the correct action verb to avoid delivering the wrong message about responsibilities, outcomes, skills, competencies etc.
- *Example*:
 - *You were asked to evaluate something, did you: appraise, choose, compare, evaluate, score, select or support. For each action verb there is a different set of skills and responsibilities.*

SKILL WORDS

M A N A G E M E N T

Developed
Reviewed
Planned
Assigned
Directed
Coordinated
Implemented

C O M M U N I C A T I O N

Influenced
Helped
Arbitrate
Led
Spoke
Arranged
Wrote

SKILL WORDS cont'd

**R
E
S
E
A
R
C
H**

**Inspected
Collected
Compiled
Clarified
Surveyed
Observed
Interviewed**

**D
E
T
A
I
L**

**Validated
Compiled
Recorded
Judged
Facilitated
Responded
Compared**

SKILLS



- Knowledge
- Qualifications: experience and education
- Required skills
- Complexity of duties
- Initiative

REQUIRED SKILLS



- **Must have integrity**
- **Detail oriented**
- **Curious, aggressive, persistent, proactive and assertive**
- **Confrontation - conflict resolution**
- **Exceptional communication skills**
- **Able to deal with all types of people**
- **Think quickly on your feet**
- **Questioning techniques and listening skills**

QUALIFICATIONS



- **University degree and /or equivalent work experience**
- **A minimum of 5 years insurance experience either as a broker, underwriter.**
- **Member of professional association**

KNOWLEDGE



- **Understand insurance legislation**
- **In depth knowledge of industry & association standards**
- **Brokers' regulations**

RESPONSIBILITIES



- Supervision received
- Errors impact
- Contacts with others - frequency and level
- Confidential data
- Functional responsibilities
- Accountability

EFFORT

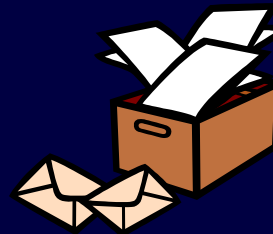
- **Mental demands**



- **Visual demands**



- **Physical demands**



EFFORT



- **Up to 8 hours at one sitting on the phone and/or computer**
- **Extended periods of time keyboarding reports**
- **May require lifting of heavy objects**

CONDITIONS

- Working conditions
- Hazards



WORKING CONDITIONS



- **Required to work late evenings and weekends**
- **20% of time spent out on the road**
- **Frequent interruptions from Customers**

SUPERVISION

- **Scope**
- **Organization control**



COMPETENCIES



- **Core - what knowledge or skills you must have to get the job done**
- **Management - outcomes requiring decision making skills**
- **Strategic - planning, decision making as it relates to the corporate strategic plan**

CORE



- **Ability to consolidate and analyze large quantities of information**
- **Strong interpersonal skills to deal with a variety of people**

MANAGEMENT



- **Prepare and evaluate budget**
- **Delegate work and responsibilities**
- **Supervision of staff**
- **Staff development**
- **Salary recommendations and reviews**

STRATEGIC



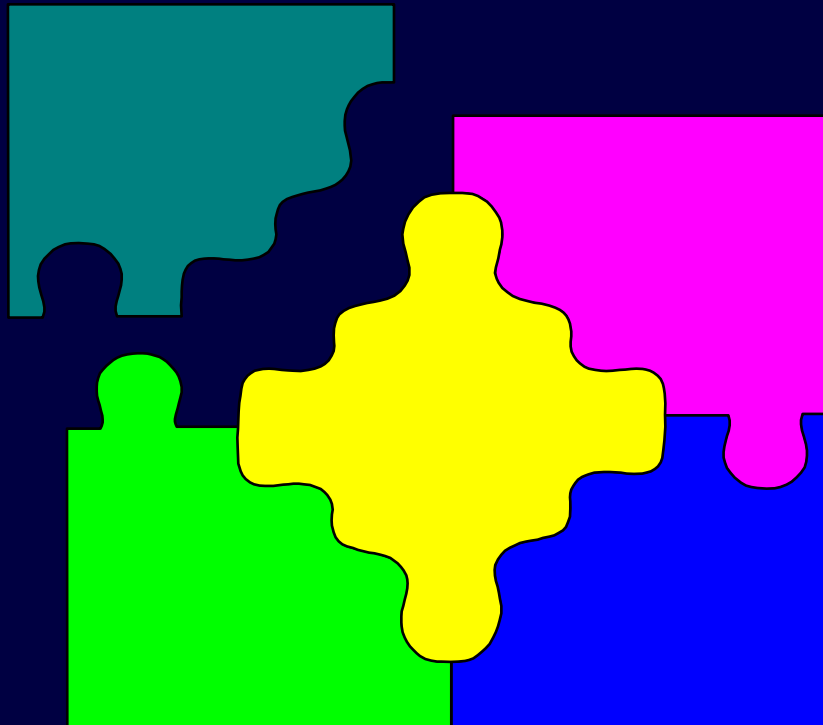
- **Develop the strategic plan**
- **Prepare the business plan as it relates to the strategic plan**
- **Determine corporate budget**
- **Identify the corporate initiatives**
- **Determine corporate structure and directives**

MISSING FROM CURRENT



- **Required skills**
- **Accountability**
- **Competencies**
- **Decision making**
- **Error implications**
- **Work timeframes**
- **Qualifications and experience**
- **Interpersonal communication**
- **Working environment and effort**

DISCUSSION



Job Description