

Job Description - Account Handler

Purpose

To achieve the company business plan through -

- Service and administer new and existing clients in a timely, professional & cost-effective manner;
- Retention of renewals in line with company retention targets;
- Develop and drive client/Insurer relationships
- Ensuring customers are treated fairly at all times in line with the company's procedures and service standards, key performance indicators (KPI's) and FSA regulatory requirements.

Main Tasks (in line with service standards and company procedures)

- Respond to enquiries from clients, prospects, underwriters and the team received by email, phone, letter, fax or other medium in a courteous, helpful and professional manner ensuring accuracy of advices at all times within published service standards;
- In conjunction with Account Executives lead renewal and new business negotiations and provide relevant documents for discussion with clients;
- Management of email inbox and Acturis task management within published service standards
- Ensuring both paper and electronic files are maintained compliantly
- Ensure accuracy of Acturis records;
- Retention of clients, GWP and income in line with company targets
- Cross selling of appropriate cover to existing clients
- Handling MTAs as per company procedures
- Invoicing as per company procedures
- Checking accuracy of documentation for transmission to clients
- Ensure prompt payment of premiums as per company procedures
- Other duties and responsibilities as may be required by the Commercial Manager and Directors

Main Skills Required

- The ability to prioritise and organise own workloads and meet deadlines
- The ability to negotiate and influence effectively with Insurers, clients and team using all communication mediums
- The ability to work under reasonable pressure when required
- The ability to communicate effectively, whether in writing, face to face or by telephone
- The ability to use Acturis to write reports and make presentations
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- The ability to work as a member of a team
- The ability to take ownership of own self development

Product knowledge/understanding required

- Intermediate level - the main classes of business insurance, insurance market practice, principles of insurance, the main methods controlling/reducing insurance risk, the company procedures and rules and, to the extent it applies to the role, regulation & compliance
- Basic level - other types of business insurance, risk management, claims handling, health and safety

Key Performance indicators (KPI's) (in line with service standards and company procedures)

- Renewal retention of 100% based on income
- Customer Service delivery & feedback in line with published service standards
- Cross selling of all relevant policies as per company procedures
- Accuracy of Acturis records & reports provided
- Accuracy of documentation
- Maintenance of diary
- Customer feedback

IT Knowledge/Understanding Required

- Acturis: full working understanding of all aspects of the system Microsoft Outlook, Word & Internet

Qualifications

- Achieved or studying towards CII Certificate in Insurance
- Full study support towards CII Diploma &/or Advanced Diploma In Insurance