

Job Description – Senior Account Handler

Purpose

To achieve the company business plan through

- Seeking performance improvement opportunities across the team/company
- Driving service delivery for new and existing clients
- Provide clear guidance and support to other team members on trading and technical issues
- Develop and drive Client & Insurer relationships
- Detailed Insurance market knowledge and presence
- Deputising for Account Executives and Directors as needed
- Ensuring customers are treated fairly at all times in line with the company's procedures and service standards, key performance indicators (KPI's) and FCA regulatory requirements.
- Identify, construct and deliver technical training sessions in conjunction with company training plan

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

- Respond to enquiries from clients, prospects and underwriters which 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 and within published service standards.
- In conjunction with Account Executives lead renewal and new business negotiation and provide relevant documents for discussion with clients;
- Be Technical referral point for clients and team
- Management of email inbox and Acturis task management within published service standards.
- Ensuring both paper and electronic files are maintained compliantly;
- Carry out monthly file audits, giving feedback to the team and identifying areas where additional training required.
- Ensure accuracy of Acturis records;
- Retention of clients, GWP and income in line with company targets
- Cross selling of appropriate cover to all existing clients
- Handling MTA's as per company procedures
- Invoicing as per company procedures
- Checking accuracy of documentation for transmission to clients
- Chase payment of premiums as per company procedures
- Other duties and responsibilities as may be required by the Commercial Manager & Directors
- Assist Claims manager with technical issues

Broking: Lloyd's of London | Gallery 4 | 12 Leadenhall Street | London EC3V 1LP

Administration: Premier House | Sydenham Road | Croydon | Surrey CR0 2EE

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Registered Office: Premier House | Sydenham Road | Croydon | Surrey CR0 2EE | Company Registered in England and Wales | Registration number 6368755

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
- The ability to work as a member of a team
- The ability to take ownership of own self development

Product knowledge/understanding required

- Advanced 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
- Intermediate 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 (D&O, CLE & CEC + other industry specific policies)
- Accuracy of Acturis records & reports provided
- Accuracy of documentation
- Maintenance of diary
- Customer feedback
- Audit results
- Training hours against plan for Chartered Insurance Brokers

IT Knowledge/Understanding Required

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

Qualifications

- ACII or FCII qualifications preferred;
- Achieved or studying towards CII Certificate in Insurance;
- Full study support towards CII Diploma &/or Advanced Diploma in Insurance.

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