

# Job Specification

## Client Service Adviser

Reporting to: Operations Manager/Team Leader

### Key Purpose

To provide exceptional service and advice to clients in order to maximise client satisfaction, maintain high retention levels and achieve income targets in support of the business strategy.

### Responsibilities

- Achieve individual objectives and key performance indicators as set and agreed
- Provide a proactive and responsive renewal service using best endeavours to retain clients at renewal through promotion of key selling features and effective liaison with insurers
- Invite renewals
- Provide professional support and advice to clients throughout the life cycle of the policy ensuring high levels of service and client satisfaction
- Ensure all policy administration is dealt with in a professional and timely manner
- Underwrite scheme policies within underwriting authority level & referral guidelines
- Be proactive and maximise all business opportunities making clients aware of alternative products (generating leads), advising clients of potential gaps in cover and promoting insurance reviews with clients wherever possible
- Check, process and issue new policies
- Adhere to all Company, regulatory and compliance guideline requirements
- Maintain own technical competence
- Support colleagues from all areas of the business as required

### Responsibilities Specific to Senior Adviser

- To assist in the maintenance, monitoring and drive of the core KPIs, processes and functions directly linked to team success.
- Coach & develop team members
- Handle a variety of complex work

- Handle policy referrals
- Be proactive & analytical in day to day role and when liaising with the management team
- Involvement with projects assigned by line managers or senior management team

## Skills & Behaviours

- Demonstrate our values of Fun, Supportive, Professional, working in Partnership and Ambitious
- Confident and capable of building rapport over the telephone to provide an excellent client experience
- Ability to work in a regulated, compliant and client focussed environment
- Organised, resourceful, deadline driven and supportive of the wider team
- Quality orientated with great attention to detail
- IT literate

## Qualifications

- Chartered Insurance Institute Certificate in Insurance