

# Job Specification

## Insurance Consultant

Reporting to: Operations Manager

### Key Purpose

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

### Responsibilities

- Achieve individual objectives and key performance indicators as set and agreed
- Fulfil the responsibilities of a Senior Client Service Adviser
- Support & assist your Line Manager and the team to deliver retention and income targets, service KPIs and meet workflow standards
- Be your Line Manager's deputy
- Provide on-hand support and coaching to the team ensuring a consistent approach is adopted for process and advice; making certain all procedures and guidelines are followed
- Support service excellence within the team to maintain a culture of 'Treating Customers Fairly' and putting the client first, with consistent delivery of the right customer outcomes
- Support colleagues in their professional development, including qualification, product and technical knowledge and help them to achieve and maintain the required competency levels
- Organise and monitor daily workflow & productivity for the team as required
- Promote, develop and enable our values and culture within the team
- Motivate and encourage the team to maximise all business opportunities, promoting insurance reviews wherever possible, identifying under insurance and meeting client survey targets
- Assist with competency sign off and complete call and file assessments as required
- Continually review and evaluate whether processes, systems and procedures could be improved and assist in implementation where required
- Provide support and direction to the team's Complaints Champion and ensure all complaints handling requirements are met

- Maintain own technical competence with an in depth knowledge of all relevant products, market trends and underwriting guidelines to effectively handle referrals and a variety of complex work

## Skills & Behaviours

- Demonstrate our values of Fun, Supportive, Professional, Working in Partnership and Ambitious
- Inspire people through motivational coaching and training
- Creative and effective in helping to shape the team to focus on service, quality standards and efficiency
- Confident and capable of building rapport over the telephone to provide an excellent client experience
- Ability to work in a regulated, compliant and client focused environment
- Organised, resourceful, deadline driven and supportive of the wider team
- Quality oriented with great attention to detail
- Driven to be pro-active to new challenges and positively shape the desired opportunities and outcomes
- IT literate and analytical

## Qualifications

- Chartered Insurance Institute Certificate in Insurance