

Job Specification

Insurance Adviser

Reporting to: Development Manager

Key Purpose

To provide exceptional service and advice to clients in order to maximise client satisfaction and achieve new business income targets in support of the business strategy.

Responsibilities

- Achieve individual objectives and key performance indicators as set and agreed
- Be proactive and maximise all business opportunities making clients aware of alternative products, advising clients of potential gaps in cover and providing effective insurance reviews with clients wherever possible
- Provide professional support and advice to clients ensuring high levels of service and client satisfaction
- Generation of leads by effectively contacting existing clients, previous clients, previous quotes and prospects
- Ensure all policy administration is dealt with in a professional and timely manner
- Underwrite scheme policies within underwriting authority level & referral guidelines
- Adhere to all Company, regulatory and compliance guideline requirements
- Be professional when representing the Company at external events such as conferences and client visits
- Maintain and develop 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 delivery of the core KPIs, processes and functions directly linked to team success
- Coach & develop team members
- Assist in quality assessment, monitoring and sign off of team members
- Handle a variety of complex work and 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 provide holistic advice based reviews and recommendations to clients
- Tenacious and motivated towards meeting and exceeding sales targets
- Ability to work in a regulated, compliant and client focused 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