

# Job Specification



## Insurance Adviser

Reporting to: Director of Naturesave

### Key Purpose

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

### Responsibilities

- Achieve individual objectives and key performance indicators as set and agreed
- Provide professional support and advice to clients ensuring high levels of service and client satisfaction
- Answer client queries, deal with renewals and mid term adjustments in a professional and timely manner
- Be proactive making clients aware of alternative products, advising clients of potential gaps in cover and providing effective insurance reviews with clients regularly
- Deal with new business quotations and/or presentations to market on behalf of Account Executives within timescales requested
- Ensure all policy administration is dealt with in a professional and timely manner
- Focus on timely collection of client money in accordance company procedures
- Adhere to all Company, regulatory and compliance guideline requirements
- Be professional when representing the Company at external events such as conferences and client visits (if required)
- Maintain and develop own technical competence
- Support colleagues from all areas of the business as required

### 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

- Holding or working towards Chartered Insurance Institute Certificate in Insurance