

## **Job Description**

**Job Title:** Insurance Advisor

**Reports to:** Sales Manager

**Role Purpose:**

To provide day to day customer service and processing of clients' insurance products in a timely, technically accurate and cost-effective manner, in accordance with procedure and performance standards.

**Duties & Responsibilities:**

- To provide administrative services to clients confining advice and information to those areas in which the jobholder is deemed competent, otherwise seeking advice as appropriate
- Monitor Insurance team email mailboxes and responding, taking appropriate action
- Make and receive customer and policy holder telephone calls
- Process policy amendments/cancellations
- Handle queries in relation to policy wording, queries and terms and conditions
- To accurately process renewal quotations on Insurance platforms and web-based quotation portals
- Process Tenant and Landlord (Single & Multi-property) Renewals, including any other actions required
- Deal with requests from claims handlers for copies of policy schedules to confirm cover and record pending claim details
- Check policy documents for accuracy prior to receipt by clients.
- To handle the collection of premiums where required
- Handle and process new business propositions and renewals for Professional Indemnity Insurance
- To provide support to the Team Leader, Insurance Account Handlers and the Insurance Sales Consultants
- Ensure compliance with local procedures, customer service standards and external compliance regulations and complaints process
- Undertake training in line with agreed objectives.
- Develop and maintain positive ongoing relationships with the Company's internal and external customers.
- To conduct the business of the Company in a courteous and friendly manner
- Undertake training in line with agreed objectives and keep up to date with technical, legal and market developments
- Carry out any other tasks that may be required of you from your line manager

## **Person Specification**

### **Attitude & Behaviour:**

- A real zest for life, enthusiasm, professionalism and a positive “can do” attitude
- Polite and courteous with all customers and colleagues
- Sincere, reliable and honest
- Methodical and organised
- A great team player
- Flexible during busy periods

### **Knowledge, Skills & Experience:**

- Insurance experience preferable but not essential as full training will be provided
- Educated to GCSE standard including Maths and English
- Excellent grammar, both verbal and written
- Excellent computer skills with good working knowledge of all standard Microsoft programs, especially excel
- Outstanding attention to detail
- Excellent telephone manner with the ability to build relationships
- Excellent customer service skills
- Ability to solve problems independently as they arise
- The ability to multitask and prioritise own workload effectively and efficiently