

Job Description

Job Title: Insurance Retention Adviser

Reports to: Insurance Administration Team Leader

Role Purpose:

To work with existing landlord and tenant customers in an aftercare role to drive long term customer loyalty. The role will involve working on new customer retention strategies as well as responding to various customer queries or complaints. To work with customers to ensure a smooth and efficient renewal process whilst building positive relationships to ensure the policy is retained at renewal and the premium is paid.

Duties and Responsibilities:

- Proactively contact clients at renewal points to ensure collection of the premium
- Maintenance of spreadsheets and accurate data for reporting
- Answering calls from existing clients and dealing with queries and / or complaints
- To collect annual premiums via the Secure Hosting System/ CHQ / BACS and set up/ renew monthly direct debits with Premium Credit
- Update payment methods depending on the customers requirements
- To work closely with the sales team to refer cases where the customer has a different set of needs and requirements
- To work closely with the finance team in the reconciliation of payments into the bank
- Issuing renewal documentation and chasing up renewal responses.
- To manage the collection of landlord premiums across the Belvoir landlord book and maintaining a good working relationship with their agents.
- Track reasons for cancellation and customer feedback for future product / service improvements
- Monitoring team email mailboxes when required and taking appropriate action
- Keeping up to date and complying with regulatory requirements
- Work to meet monthly retention targets
- Undertaking training inline with agreed objectives and keep up-to-date with technical, legal and market developments
- Carry out any other tasks that may be required from your line manager

Person Specification

Attitudes and Behaviour:

- An enthusiastic, passionate and highly motivated person who demonstrates professionalism and a positive “can do” attitude.
- Polite and courteous with all customers and colleagues
- Show resilience and tenacity everyday whilst delivering industry leading customer service.
- Sincere, reliable and honest
- Methodical and organised
- A great team player

- Hard worker who is keen to learn and progress

Knowledge, Skills and Experience:

- Ability to communicate in an effective and influential way
- Experience in Customer Service
- Excellent telephone manner with the ability to build relationships
- Outstanding attention to detail
- Experience in General Insurance beneficial
- Educated to GCSE standard including Maths and English
- Excellent grammar, both verbal and written
- Excellent computer skills with good working knowledge of MS Word, Outlook and Excel programs