

Job Description

Job Title: Insurance Advisor

Reports to: Insurance Administration Team Leader

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
- Monitoring Insurance team email mailboxes and responding, taking appropriate action
- Making and receiving telephone calls to customers and policy holders
- Processing policy amendments/cancellations
- Handling queries in relation to policy wording, queries and terms and conditions
- Accurately processing renewal quotations on Insurance platforms and web-based quotation portals
- Processing Tenant and Landlord (Single & Multi-property) Renewals, including any other actions required
- Dealing with requests from claims handlers for copies of policy schedules to confirm cover and recording pending claim details
- Checking policy documents for accuracy prior to receipt by clients.
- To handle the collection of premiums where required
- 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 at all times in a courteous and friendly manner
- 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