

## **Job Description**

**Job Title:** Insurance Customer Service Representative

**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:**

- 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 inputting renewal quotations onto Insurance platforms and web-based quotation portals
- Checking systems for online renewal quotes that have "referred", establishing the reason for referral e.g. flood risk postcodes, vacant or larger properties and sending it to the relevant insurer to review
- Maintenance of spreadsheets and accurate data for reporting of insurance source/renewal/retention/bordereaux
- 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
- To provide support to the Insurance manager and Insurance Sales Consultants
- Ensure compliance with local procedures, customer service standards and external compliance regulations and complaints process
- 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:**

- 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
- Insurance experience preferable but not essential as full training will be provided
- Excellent customer service skills
- Ability to solve problems independently as they arise
- The ability to multitask and prioritise own workload effectively and efficiently