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| **Job description**  |
| **Role** | Renewals Consultant |
| **Main purpose of the role** | To provide support to existing Lifesure customers and ensure retention of renewal business, servicing of existing accounts in line with the set Key Performance Indicators provided by the company, and in accordance with company procedures and regulatory requirements. This is predominantly a customer service role that requires confidence in decision making and a sales approach to dealing with customers at their renewals. There will also be various outbound calling to existing Lifesure customers and mutual insurers for claim updates and policy queries. |
| **Location**  | St Neots |
| **Working hours** | 8:30-16:30 Mondays to Friday, 37.5 hours per week30 minutes unpaid lunch break |
| **Department** | Renewals |
| **Salary** | £19,000 to £25,000 (subject to experience) |
| **Reports to** | Danielle Jackson |
| **Direct Reports** | None |
| **Key Responsibilities and Deliverables** | Process existing clients at renewal, update and deal with new/existing claims and providing excellent customer service in all dealings with customers such as:* Ascertaining customer requirements and advising accordingly
* Disclosing clear and useful information about the product
* Ensuring all verbal disclosures are discussed with customers
* Issuing all necessary paperwork to customers
* Ensuring customer is aware of any changes in cover and premium
* Diary processing involving chasing customers for outstanding documents and updates on risk details
* Outbound renewal chasing and customer service calls
* Helping clients with revised renewals
* Dealing with client obtained competitor rates
* Reporting and analysis to provide data to insurers and the MID
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| **Other Responsibilities** | Follow all company procedures and regulatory requirements, with specific reference to data protection regulations. Assist in the growth of the business by cross selling other products as appropriate. General Administration.Other ad hoc duties as and when required by management. |
| **Behaviours** | * Promote the Lifesure values at all times: Commitment, Family, Delight, Caring and Integrity
* Inspire and be motivated to achieve personal, departmental and company goals
* Support colleagues across the business, operating as one team
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| **Working Relationships** | This role will involve working in a team environment and will require the candidate to build and maintain strong working relationships with colleagues |
| **Major Challenges** | The successful candidate will be working in a busy office environment which involves working under pressure and to deadlines. Successful applicants will have a self starting mindset. |
| **Date of Preparation** |  |
| **Date Revised** | Oliver Scott – 26/02/2021 |

**Person Specification**

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| **Criteria** | **Essential** | **Desirable** |
| Education and Qualifications |  |  |
| Knowledge and Skills |  |  |
| Personality, Character Traits and Disposition | Keen to learn, willing to ask questions and to quickly absorb new information. Conscientious and motivated to meet targets and contribute to the team. An excellent teamplayer, personable and able to get on with colleagues in all teams. Able to work under pressure in a busy office. |  |
| Miscellaneous  | Proof of the right to work in the UK will be required. Money handling procedures require that a personal credit check is carried out for the successful candidate.  |  |