

JOB DESCRIPTION

Job Title:	Personal Lines and small business portfolio handler
Job Reference:	
Job Holder:	
Reports To:	Director
Date:	

1. PURPOSE

Contribute to the growth of the business by achieving new business and retention sales on personal lines, and supporting the business in developing its portfolio of SME business

2. MAIN TASKS

1. Ensure own financial and service targets are achieved or exceeded in relation to personal lines new business and retention
2. Issue client documents in a timely manner in accordance with regulatory requirements, ensuring accuracy and attention to detail
3. Support the external salesforce of the business by engaging with the market to obtain competitive quotations for small commercial business
4. Seek ways to contribute towards the growth of business, via new business, upselling, cross-selling, developing the sales pipeline, and excellent customer service
5. Identify opportunities for to increase sales revenue through attaining new business, renewals, up-selling and cross selling targets
6. Supporting customers through the claims process by engaging with insurers and liaising with the client
7. Deal with complaints and enquiries to the customer's satisfaction, ensuring right resolution first time
8. Support colleagues in Accounts in ensuring the timely collection of outstanding premiums, and achievement of aged debt targets

3. KEY PERFORMANCE INDICATORS

- Achievement new business, upselling and cross selling monthly targets in accordance with budgeted income
- Achievement renewal retention (monetary and policy count) monthly targets in accordance with budgeted income
- Complaint handling
- Performance targets achieved – Availability, revenue and conversion etc.

4. CORE COMPETENCIES

- Level 1 (Basic) - Demonstrates a general understanding of the subject and can apply things learned under supervision
- Level 2 (Intermediate) - Demonstrates a full understanding of the subject and can apply things learned subject to authority levels and referral procedures
- Level 3 (Advanced) - A full understanding of the subject and sufficient exposure to demonstrate ability, particularly in identifying when referral may be necessary

A. Knowledge of the following Classes of Business

Competence	Level
Motor	2
Motor Legal	2
Package policies (pub, office, hotel, surgery, etc)	1
Small Commercial Combined	1

B. Knowledge of the following Soft Skills

Competence	Level
New Business & Quotations	2
Renewals	2
Accounting	1
Claims	1
Processing	2
Microsoft products	2
Health & Safety Regulations	2
GDPR regulations	2
Negotiating	2
Sales	2
Compliance Regulations	2