

JOB DESCRIPTION

Job Title: Portfolio Manager – Republic of Ireland

Job Reference:

Reports To:

Date:

1. PURPOSE

Contribute to the growth of Dickson + Co's presence in the Republic of Ireland, by producing new business income and maximising renewal retention in line with budget expectations, and by creating developing and converting prospects, all in accordance with agreed procedures and regulatory requirements

2. MAIN TASKS

1. Achieve or over-achieve against quarterly and annual New Business, Renewal, and where specified cross-sell and up-sell targets
2. Drive the growth of the business by generating enquiries by building and developing an effective prospecting pipeline, from NTU and win-back activity, asking for referrals, working with introducers, and by pro-actively cross-selling and up-selling to existing clients
3. Complete comprehensive fact-finding with prospects and clients to identify all risk requirements and gaps in cover, provide a quotation that meets their requirements, and convert the prospect into business
4. Build close working relationships with clients that will maximise likelihood of retention, by servicing their requirements throughout the year, maintaining close contact, and keeping them up to date with developments relevant to their business and/or sector
5. Develop close working relationships with the Dickson + Co panel of insurers to ensure that they negotiate the best covers for clients
6. Work closely with Portfolio Handlers to ensure that responsibilities for servicing clients and pursuing new business are clearly agreed, understood, and fairly shared
7. Keep client files and system records in good order and up to date in accordance with company procedures, and ensure that clear and legible records are kept in respect of all client discussions. Oversee the completion of administrative duties such as the issue of policy documentation, the follow-up of correspondence, and the diaring of actions, to ensure that clients are adequately supported
8. Develop technical product knowledge and market knowledge through discussions with insurers, colleagues and other industry experts, reading the press, and in general keeping up to date with relevant industry and sector developments. Act as a referral point on selected areas of technical expertise
9. Support colleagues in accounts in ensuring the timely collection of outstanding premiums, and achievement of aged debt targets

10. Ensure that relevant CBI regulations with regard to client management are adhered to, including complaints management, the issue of policy documentation, and disclosure to insurers

3. KEY PERFORMANCE INDICATORS

- Achievement of new business and where specified cross-selling and upselling monthly targets in accordance with budgeted income
- Achievement of renewal retention (monetary and policy count) monthly targets in accordance with budgeted income
- Number of pipelined prospects created / quoted / converted
- Aged Debt reports

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

Property & Business Interruption	Level
Material Damage	3
All Risks	3
Business Interruption	3
Commercial Vehicle	3
Fleet	3
Liabilities	
Employers Liability	3
Public Liability	3
Products Liability	3
Pollution Cover	3
Financial loss, inefficacy	3
Products Guarantee & Recall	3
Professional Indemnity & D & O	3
Commercial Legal Expenses	3
Personal Lines	
Private Car	1
Motorcycle	1
Caravan	1
Home	1
ULR	1
Crime	
Theft/Money	3
Transit	
Goods in Transit	3
Marine/Cargo	3
Personal Accident/Travel	
Group Personal Accident	2
Travel	2
Permanent Health Insurance	2
Engineering	
Inspection (pressure & Lifting plant)	2

All Risks Plant hired in & out	2
All Risks Computers	2
All Risks Machinery & B/down	2
Mach. B/down & Loss of Profits	2
Machinery transit/erection	2
Contractors/Construction	
All Risks Work in Progress	3
All Risks Plant hired in & out	3
All Risks Own Plant	3
Advance Profits	3

B. Knowledge of the Following Technical/Soft Skills

	Level
Principles of Insurance	3
Internal Working Procedures:	
New Business & Quotations	3
Renewals	3
Accounting	2
Claims	3
Processing	3
Internal Computer Systems	2
Negotiating Skills	3
Sales Skills	3
Compliance Regulations	3
Health & Safety Regulations	2
GDPR regulations	2