

# A-One Insurance Group



## Job Description

This job description indicates the general level of responsibility and standards expected of the post. The duties may develop over time without changing the level of responsibility. This job description does not form as part of your employment contract.

<b>Job Title</b>	Trainee Personal Lines Account Handler		
<b>Department</b>	Personal Lines	<b>Reports To</b>	Personal Lines Team Leader
<b>Key Relationships</b>	All departments		
<b>Context</b>	Location: Ferndown, Dorset Hours: 8:30am – 5pm Monday – Friday		

**Job Summary** To develop and maintain a portfolio of clients, encompassing new business, renewals and adjustments, in addition to client contact and the maintenance of manual and IT-based office systems.

**Job Content** **The following key results areas should be carried out in compliance with statutory requirements, industry and other relevant codes of practice**

### **SALES**

To achieve individual new business target and monitor individual sales activity to ensure all avenues are maximised.

To adhere to and support new and existing sales incentives across the team, i.e. Cross selling, networking and referrals.

### **CUSTOMER SERVICES**

To ensure that customer service levels are implemented and maintained to a high level and team achieve at least 90% customer satisfaction levels in all areas.

To ensure that there are no more than 1% complaints per month for the department.

To ensure that telephone response times are maintained in accordance with specified parameters.

To ensure that all complaints are dealt with within 24 hours in accordance with regulatory requirements.

### **ACCOUNT MANAGEMENT**

Ensure that insurance and risk management needs are fully met to the satisfaction of clients and the team.

To accurately present recommendations and options to clients.

To ensure that full risk information is presented to insurers, ensuring the best premium for the client.

Ensure that all clients are appropriately informed of all matters relating to their insurance in a timely manner and in accordance with FSA guidelines.

Accurately document all instructions/conversations with clients on manual and IT based systems, with specific emphasis on the latter.

To work in line with established administration processes to ensure all documentation is accurately produced and distributed to clients.

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Ensure that all renewals are actioned within FSA guidelines.

Ensure that all Mid Term Adjustments are actioned appropriately.

To ensure that there is a minimum renewal retention rate of 70%.

### PERSONAL DEVELOPMENT

To keep the team leader informed appropriately and as required of his/her work.

To maintain a sound knowledge of clients industries, businesses and risks.

To develop and maintain an appropriate knowledge of the market.

To be working towards or achieved the Certificate In Insurance.

To correctly complete and participate in Continual Professional Development, with monthly sheets being submitted to the Team Leader.

### ACCOUNTING, FINANCE & OFFICE

To be aware of premium dues and bad debt and minimise levels across the portfolio.

To ensure the timely payment of all premiums in line with FSA regulations.

To maintain open lines of communication with accounts to assist in the resolution of account queries within the specified timeframe.

To be aware of and monitor the correct use of commissions.

To monitor and communicate potential marketing and advertising expenditure with the Team Leader.

To adhere to Health and Safety processes within the department in accordance with company procedures.

To ensure that all claims notifications are communicated and passed through to the Claims department immediately by all employees.

### Dimension

This post has no line management responsibilities

**Signed  
(HR)**

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**Signed  
(Employee)**

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**Print Name**

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**Print Name**

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#### Person Specification

	Essential	Desirable
<b>Work Experience</b>	Minimum of 1 year working experience in either a customer service or sales/telesales environment.	
<b>Specific Skills</b>	Good customer service skills Excellent telephone manner Attention to detail and Accurate Letter writing skills Excellent organisational skills A team player Good numeracy skills	
<b>Education</b>	High school education or equivalent	