A-ONE
INSURANCE GROUP

Protecting Your Tomorrow

# Property Portfolio Manager


## Summary

To develop and maintain a portfolio of clients that encourages long term relationships, encompassing new business, renewals and adjustments, through client contact, and the preparation of presentations and the maintenance of manual and IT-based office systems.


| Department | Location | Hours | Direct Report |
|---|---|---|---|
| Property | Head Office (with occasional travel to other offices) | Full-time, Mon-Fri<br>8.30am – 5pm | Property Team Manager |

## Benefits

- Full training & career progression
- Hybrid Working
- Up to 30 days holiday
- Enhanced Pension

## Sales

- To realise individual sales targets through the achievement of new business and renewal figures, self-monitoring individual sales activity to ensure all avenues are maximised.
- To track and monitor progress of activity monitoring conversion rates for leads, appointments, quote and sales activity.
- To adhere and support new and existing sales incentives across the company, i.e. Cross selling, networking and referrals.

## Customer Service

- To ensure that customer service levels are implemented and maintained to a high level ensuring that team achieve results whereby at least 90% of clients are satisfied with the level of service provided.
- 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 1 working day in accordance with FCA requirements, or if unresolved/unsatisfied such complaints are passed to compliance manager immediately.

## Account Management

- Ensure that insurance and risk management needs are fully met to the satisfaction of clients and the team.
- To ensure that full presentations are sent out to market and are actively managed to ensure the best premium and level of cover are obtained for the needs of the client.
- Ensure that all clients are appropriately informed of all matters relating to their insurance in a timely manner and in accordance with FCA guidelines, accurately presenting recommendations and options to clients.
- To work in line with established administration processes to ensure all documentation are accurately produced and distributed to clients.
- Accurately document all instructions/conversations with clients on manual and IT based systems, with specific emphasis on the latter, ensuring client files are kept up to date.
- Ensure that all renewals are actioned within FCA guidelines.
- To encourage long term relationships with our clients ensuring that a minimum renewal retention rate of 90% is obtained.
- Ensure that all Mid Term adjustments are actioned appropriately in a timely manner.
- To maintain NTU level below 10% in any one-month period.

## 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 navigate and effectively maintain manual and IT systems for processing, accounting and administration purposes, making recommendations for development and improvements where applicable.
- To ensure and re-enforce the timely payment of all premiums in line with company procedures.
- To be aware of premium dues and bad dept and minimise levels working in line with processes and procedures to avoid credit control referrals.
- 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 ensure that Health and Safety processes are adhered to 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.
- Assist in the creation, development and implementation to improve processes and procedures for the team and company.
- To provide flexibility and support to the business, undertaking any reasonable tasks as requested by your manager or member of the management team.

## Dimension

This post has no line management responsibilities

## Employee

| | |
|---|---|
| Sign | |
| Print Name | |
| Date | |

## Company HR Representative

| | |
|---|---|
| Sign | |
| Print Name | |
| Date | |