



Job Title: Customer Service Associate

Main purpose:

Reporting to the Customer Service Team Leader/Branch Manager/Branch Director, the main purpose of the role is to service existing customer's insurance policies, ensuring the consistent delivery of excellent customer service.

Main responsibilities/tasks:

The job holder must be competent to complete the following tasks:

- Effectively manage a high volume of incoming calls and offering necessary assistance to new and existing clients, ensuring that their expectations have been met.
- Communicate, administer and process changes or adjustments to client policies, ensuring this is processed compliantly with the insurer and recorded on the client database.
- To record all client conversations including general queries, prices or quotations and complaints on the customer database.
- Consistently achieve income targets whilst adhering to FCA compliance obligations.
- Maximising sales opportunities by proactively selling and securing additional business.
- Raising underwriting concerns and rating risks appropriately.
- Negotiating insurance rates with clients and underwriters and to trade with insurers to maximise income potential.
- Accurately completes administrative tasks such as post, diary as well as account and insurer queries.
- Assist other team members and departments as required.
- Securing a consistent pass rate on all call observations.
- Having a good product knowledge of the field, along with a good knowledge of systems, processes and company procedures.
- Awareness of complaint handling – Being able to resolve minor customer complaints and being fully aware of the company complaints process.
- Deliver exceptional levels of customer service at all times.
- Can solve problems within their level of authority and know when to escalate beyond their own level of authority.
- To ensure accuracy, efficiency and professionalism when dealing with internal and external clients, including both colleagues and insurers.
- General administration work: Prioritise all client communication (via phone, email and in person) to ensure the customer receives a high level of customer service.



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Person Specification:

Level of skills and knowledge required	Essential Criteria	Desirable Criteria
Previous Experience	Have experience of working in a client facing environment or call centre role.	Have previous insurance and/or customer service experience with a proven record of achieving KPI's along with having a good product knowledge.
Skills and Knowledge	The ability to manage a high volume of inbound calls and deliver a high standard of customer service.	Knowledge of client management systems including insurer quote engines. Knowledge of industry rules and regulations.
Personal Qualities	The ability to multi-task, have effective communications skills, both verbal and non-verbal. Is motivated and enthusiastic, remaining professional at all times. Good degree of organisation and flexibility in order to meet customers' demands. Committed and flexible to business needs. Responsible, results driven attitude, innovative, persistent and a good communicator.	
Educational Qualifications	GCSE or equivalent in Math's and English.	
Insurance Qualifications	None required.	Cert CII.
IT & Computer Skills	IT Literate and be adept in use of MS Office XP, particularly Excel and Word. Must be able to utilise the internet and office email facilities.	
Regulatory Requirements	The job-holder must have full knowledge of regulatory requirements pertaining to the role, including in particular, but not limited to disclosure requirements, rules relating to money handling, complaints processes, record keeping requirements and principles for conduct of business and FCA threshold conditions.	

This job description is not exhaustive and is subject to review in the light of changing needs of the organisation. Any review of this job description will be undertaken in consultation with the post holder.

If you would like to apply for this role please email: recruitment@countyins.com along with your CV or call **01270 506970**.