



Job Title: Renewals Executive

Main purpose:

Reporting to the Renewals Team Leader/Sales Manager/Branch Director, the main purpose of the role is to retain a high number of existing customers by completing a full market search and trading with insurers, whilst delivering excellent customer service.

Main responsibilities/tasks:

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

- Consistently achieve income targets whilst adhering to FCA compliance obligations.
- The achievement of retention targets alongside income targets.
- Making contact with clients when their policy falls due for renewal, ensuring that any cover or policy changes are actioned along with the completion of a full market search to obtain the most competitive price.
- To administer the renewal from the initial review, through to market search, quotation, closing of sale, issuing of cover and follow up documentation requests.
- 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.
- Securing a consistent pass rate on all call observations.
- Manage incoming enquiries, for example mid-term adjustments, deal with the request or direct them to relevant departments.
- 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.
- Assist other team members and departments as required.
- 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.



The County Group

Insurance & Financial Solutions

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 sales experience with a proven record of achieving KPI's including customer retention, along with having a good product knowledge.
Skills and Knowledge	The ability to overcome objections. The ability to manage the generation of sales and administering of documentation.	Knowledge of client management systems including insurer quote engines. Knowledge of industry rules and regulations.
Personal Qualities	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, 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**.