



The County Group

Insurance & Financial Solutions

Job Description

Job Title:

Account Handler

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Name:

Reports To:

1. Job Purpose:

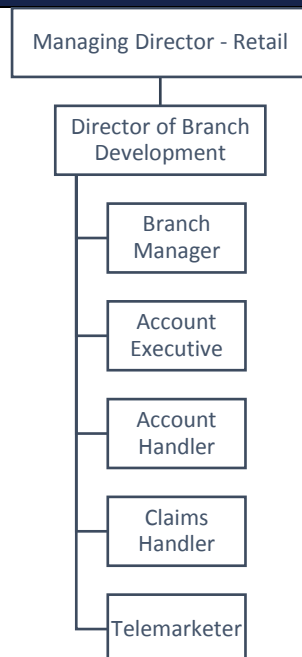
To assist members of the Account Management team by prospecting, administering and renewing commercial business

2. Responsibilities:

Responsible to: Branch Manager

Responsible for: The accurate administration of new and existing commercial business; delivering outstanding customer service to all existing and prospective customers and to deliver objectives set by line manager

3. Organisation Structure:



4. Principal accountabilities / responsibilities:

- Deliver excellent customer service to all customers
- Uphold the company's mission statement and values
- Gather necessary information from new and existing clients to enable the adequate presentation of the risk to insurers for quotation purposes
- Obtain terms for individual cases
- Prepare summaries of insurance, schedules and proposals for insurers as required, ensuring that all client records are adequately maintained in line with the companies procedures
- Maintain timely contact with all clients, prospects and referral networks to establish good working relationships
- Accurately complete administrative tasks such as post, diary as well as account and insurer queries
- Awareness of complaint handling – Being able to resolve minor customer complaints and being fully aware of the company complaints process
- To ensure accuracy, efficiency and professionalism when dealing with internal and external clients, including both colleagues and insurers
- Have an in depth product knowledge of their field
- Ensuring tasks are completed in a timely and efficient manner
- Liaise and build relationships with insurers and customers – both internally and externally
- Liaise with the line manager regularly to ensure consistent sales processes are being followed and adhered to

5. Competencies:

- **Customer Focused:** To deliver excellent customer service to internal and external customers, by being available, reliable and attentive. Customer focus is central to County's culture in ensuring **the Customer is at the heart of everything we do**. Striving for excellence and making a difference means that every customer is treated fairly, they feel valued and are dealt with individually, with the aim not only to meet, but exceed their expectations
- **Achieving and Delivery:** To always give 100% to achieve and exceed your objectives, whilst upholding County's values
- **Working Collaboratively:** To work together and contribute to the teams' high standard of performance. Working collaboratively encompasses the value of Teamwork - Working

together as one team means that we increase our resourcefulness and are able to work better in servicing our customers' needs

- **Working with Integrity:** Being honest, trustworthy and treating both internal and external customers with respect. Working with Integrity focuses on Respect – Our values promote always considering the feelings and wishes of our Colleagues, Customers and Partners
- **Continuous Improvement & Change:** To demonstrate a willingness to implement change that adds value and our ongoing efforts to improve products, service and working practices. Continuous Improvement and Change is crucial to the future success of County. To deliver excellence to our customers, we must strive to continuously improve the way we work and to seek out opportunities to create effective change that adds value
- **Building Capability:** Obtain, improve and retain the skills and knowledge needed to carry out your role effectively

6. Role requirements:

Essential criteria:

- IT literate i.e. Microsoft Word and Excel

Desirable:

- Previous commercial, account management experience
- Insurance qualification i.e. Cert CII or above
- Proficient in operating Acturis/ Open GI and insurer quote engines
- Understanding of FCA regulation

7. Company information, job knowledge, skills and experience:

The County Group, part of Global Risk Partners (GRP) are a UK based retail insurance broker operating in the personal, SME and middle markets, including delegated schemes and affinity

SIGNATURES: *After reviewing the contents sign it to confirm its accuracy*

JOB HOLDER:

DATE:

LINE MANAGER:

DATE: