

JOB DESCRIPTION

Name:

Job Title: Trainee Account Executive

Department: Jewellers Block

Reporting to: Branch Manager

Location: Glasgow Office

TH MARCH COMPANY VALUES:

The post holder will be expected to operate in line with TH March values which are:

WE PUT CUSTOMERS FIRST

We value customer relationships & listen carefully to understand their requirements.

WE DO THE RIGHT THING

Acting with honesty and integrity, we are fair and respectful in everything that we do.

WE LOOK FOR SOLUTIONS

We enjoy helping our customers, partners and colleagues find answers and solutions to their requirements or problems and are committed to the customers and trades in which we specialise.

WE ARE A TEAM

We take pride in our accomplishments. We support each other, sharing our knowledge and experiences, always striving to achieve the highest possible standards.

PURPOSE OF ROLE:

To undertake designated duties within the Glasgow Office in accordance with TH March requirements.

JOB COMPETENCIES:Responsibilities:

- Identify and develop new business in line with Company objectives, involving working to set targets for the area you cover.
- Manage account relationships with designated clients, acting as primary point of contact for clients from a sales and business development perspective.
- Handle and respond to product queries from clients quickly, efficiently and accurately.
- Successfully broke new business enquiries and insurance renewals and provide a first-class service to clients by fulfilling their insurance requirements.
- Provide insurers and underwriters with accurate information to ensure they can assess each risk correctly.
- Negotiate deals within the industry market, where required, in order to meet client demands and remain competitive.

- Build up detailed knowledge about the company's products and offer advice about existing products and promoting value added services.
- Build and maintain effective professional relationships with clients, insurers and other staff within the Company.
- Keep abreast of market conditions and developments and physical and alarm security procedures.
- Liaise with colleagues to share information about the current insurance marketplace, and to assist them with any insurance queries.
- Deliver presentations to clients and occasionally representing the business at exhibitions, etc.
- Provide claims assistance when required.
- To maintain accurate files and to ensure correspondence and telephone notes are correctly recorded in the Policy Administration System.
- To maintain clients' and the Company's confidentiality at all times.
- To fully understand TH March Policies and Procedures and ensure they are adhered to.
- To comply with the Company Policy on Information Security and Acceptable Use.
- To undertake all other duties as reasonably required and directed.

Behaviours:

- To embrace and behave in line with TH March Values.
- To comply with FCA Rules & Regulations.
- To comply with the FCA's Treating Customers Fairly principle including:
- Acting in an honest and open manner at all times with both clients and the Company.
- Acting with integrity by demonstrating fairness and impartiality.
- Demonstrating a client focussed approach.
- To ensure that business transactions are conducted in a way that is clear and straightforward.
- To treat everyone with dignity and respect
- To enhance your role by undertaking appropriate training and personal development courses, as required.

Skills Required:

- Excellent customer service & IT skills and telephone manner.
- Effective communication skills, both verbal and written.
- Ability to gather and analyse information for the client and resolve problems.
- Ability to identify and respond appropriately to an individual client's level of understanding.
- Ability to identify and match products with client requirements.
- Ability to persuade and influence others.
- Ability to demonstrate, understanding and apply TH March values. These are embedded in all roles.