

## JOB DESCRIPTION

**Name:**

**Job Title:** Administrative Assistant

**Department:** Jewellers Block

**Reporting to:** Team Leader


**Location:** Sevenoaks Office


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### 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 insurance 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**  
Employees feel valued, connected and respected. 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 Sevenoaks Office in accordance with TH March requirements.

### JOB COMPETENCIES:

#### Responsibilities:

- Answer calls and maintain a rapid response rate according to agreed standards in an efficient, professional, and courteous manner.
- To be aware of the availability of staff likely to receive inbound calls.
- Log information on calls received, where required and maintain detailed and accurate records.
- Provide support and assistance to Account Handlers, Account Executives and other staff within the Company.

- Occasionally assist with the opening, scanning and distributing of any incoming mail ensuring that it is saved in the Policy Administration System.
- Manage the Sevenoaks Office – Mailbox and distribute accordingly, saving all external emails into the Policy Administration System as and when required.
- Assist Team Members with the saving of emails into the Policy Administration System, as and when required.
- Arrange client appointments, send confirmation emails for visits, adding Outlook calendar entries and updating the Policy Administration System.
- Assist with the preparation of renewal packs for Account Exec for visits, as and when required.
- Arrange appointments for security surveys as and when required and update the survey book and/or calendar.
- Prepare and issue renewal letters and process renewals within Policy Administration System, as and when required.
- Provide cover for the processing of endorsements within the Policy Administration System when colleagues are on annual leave, and to save into the Policy Administration System.
- Provide office assistance as and when required – i.e., ordering stationery etc.
- Occasionally sorting of outgoing mail and take it to the Post Office.
- Assist with Credit Checks as and when required.
- The input of data into the Policy Administration System for New Business and Renewals.
- Perform administrative tasks as assigned and for other departments as needed.
- Establish and maintain effective working relationships with co-workers, supervisors, clients and visitors.
- 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, understand and apply TH March values. These are embedded in all roles.