





## JOB DESCRIPTION

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| <b>Job Title:</b>    | Personal Insurances Account Handler |
| <b>Department:</b>   | Personal Insurances                 |
| <b>Reporting to:</b> | Personal Insurances Team Leader     |
| <b>Location:</b>     | National Service Centre             |

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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 requirements.
-  **WE DO THE RIGHT THING**  
Acting with honesty and integrity, we are fair and respectful in everything 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 Personal Insurances Department in accordance with the Company's requirements.

### JOB COMPETENCIES:

#### Responsibilities:

This is a phone-based role dealing with incoming calls and handling day to day queries from new or existing clients in a pleasant contact centre environment:

- To successfully broke new business enquiries and insurance renewals and provide a first class service to clients by fulfilling their insurance requirements.
- To build and maintain relationships with clients, insurers and other staff within the Company.
- To liaise with colleagues to share information about the current insurance marketplace, and to assist them with any insurance queries.

- To comply with service standards at all times, to ensure the best service is provided to clients.
- To provide insurers and underwriters with accurate information to ensure they can assess each risk correctly.
- To maintain accurate files and to ensure copies of correspondence and telephone notes are correctly recorded.
- 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 comply with FCA 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 enhance your role by undertaking appropriate training and personal development courses, as required.

#### **SKILLS REQUIRED:**

- Excellent customer service 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.