

JOB DESCRIPTION

Job Title:	Home & Private Collections Account Handler
Department:	Home & Private Collections Team
Reporting to:	Team Leader
Location:	National Service Centre

TH MARCH COMPANY VALUES:

The post holder will be expected to operate in line with our workplace 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 administrative duties in accordance within the Company's requirements.

JOB COMPETENCIES:

RESPONSIBILITIES:

General Duties

- Creating Websure records
- Keeping Websure records updated and relevant in line with customer updates and instructions
- Communicating with insurers in regard to customers insurance requirements
- Processing transactions and issuing documentation following receipt of payment via BACS payments issued into shared inbox daily.
- Reviewing failed Premium Credit requests and resolving issues
- Reviewing accounts queries and resolving issues
- Submitting data feeds to Arc Insurance (task assigned to selected trained account handlers)
- Keeping up with relevant training, including Dev Zone and IDD requirements. (As per current amended duties)

Underwriting

- Underwriting Beazley risks on both THM and sub broker cases, in line with allocated underwriting levels (individually awarded in line with capability)
- Present suggested terms to more senior underwriters where required

HOME, LET, HIGH NET WORTH, UNOCCUPIED, RENOVATION, MARINE AND MOTOR INSURANCE

New Business

- Receiving telephone calls from customers requesting Insurance quotations
- Obtaining all relevant risk information
- Seeking quotations in line with customers' demands and needs
- Presenting risks to customers verbally and in writing
- Taking 'on risk' instructions and providing all relevant regulatory information
- Processing transactions
- Issuing documents to customers

Existing Business

- Receiving telephone calls from customers and taking instructions
- Receiving emails from customers and taking instructions
- Deciphering customer instructions and processing changes or requirements in line with customers' demands and needs
- Processing transactions
- Issuing documentation to customers

Renewals

- Receiving telephone calls from customers who have received renewal invitations and discussing queries, changes and premium queries.
- Negotiating revised terms with insurers where relevant.
- Processing renewal instructions, transactions and issuing relevant documentation.

Shared inbox

- Reviewing emails within the shared inbox throughout the day and completing relevant tasks from emails from customers, colleagues and insurers, managing time to ensure cover issues and urgent emails are actioned in a timely manner.

PRIVATE COLLECTIONS

New Business

- Receiving telephone calls from customers requesting Insurance quotations
- Obtaining all relevant risk information
- Seeking quotations in line with customers' demands and needs
- Presenting risks to customers verbally and in writing
- Taking 'on risk' instructions and providing all relevant regulatory information
- Processing transactions
- Issuing documents to customers

Existing Business

- Receiving telephone calls from customers and taking instructions
- Receiving emails from customers and taking instructions
- Deciphering customer instructions and processing changes or requirements in line with customers' demands and needs
- Processing transactions
- Issuing documentation to customers

Renewals

- Receiving telephone calls from customers who have received renewal invitations and discussing queries, changes and premium queries.
- Processing renewal instructions, transactions and issuing relevant documentation.

BEHAVIOURS

- To embrace and behave in line with TH March Values.
- 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 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 skills and telephone manner.
- Effective communication skills, both verbal and written.
- Ability to gather and analyse information for the client/Sub broker 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.