



Job Description

Job title: Client Services Executive

Department: FlatGuard

Location: Manchester

Job role overview

To support Director and Account Executive to maintain a key client's Property Insurance portfolio, providing a high quality, professional and efficient service.

Key responsibilities

1. Work with the client to understand their needs and identify the most effective cover for their requirements
2. Collate general and claims information and risk report for pre renewal and renewal meetings
3. Manage the renewal/placing process in a timely manner, obtaining renewal terms and quotes, highlighting potential risks and agreeing terms in line with client requirements including any mid-term alterations.
4. Confirm renewal/placing cover with insurers and Invoicing premiums.
5. Ensure accurate recording of information on Acturis
6. Support the FlatGuard management team by conducting research, compile data and prepare for meetings/projects that they are involved in
7. Invoice premiums and where required, set up direct debit agreements for new business and renewal, liaising with the Bridge accounts team and insurers directly
8. Deliver great customer service by responding swiftly to queries and concerns from clients, by telephone, email or letter, ensuring service standards are always met
9. Keep up to date with current market conditions and external factors affecting the Clients Business and sector
10. Monitor and report on performance against agreed targets
11. Ensure compliance with regulations and procedures as laid down by the Financial Conduct Authority
12. Keep up to date with all changes in the regulatory framework
13. Work with underwriters to amend policies where necessary in order to meet client demand
14. Act with integrity and always maintain Bridge reputation and standards

The successful candidate is likely to have the following skills, attitude and experience

1. Experience within construction and property insurance (Likely to have been gained over a minimum of 5 years' experience)
2. Expert user of Microsoft packages including Word, Excel and TEAMS
3. Experience of managing large property portfolios in Excel whilst maintaining an active record of premiums, using formulas, an understanding of insurer ratings, mid-term adjustment calculations and clear understanding of creating mail merges to process documentation whilst using Excel as a record for all data would be an advantage.
4. Minimum Cert CII / willingness to continue to progress towards Professional Qualifications

5. Excellent negotiation and communication skills with an ability to secure the best deals for clients and our business
6. Ability to develop and manage good working relationships with clients and insurers through building trust and mutual respect
7. Deliver great customer service by responding swiftly to queries and concerns from clients
8. Have good industry and sector knowledge, maintained through CPD.
9. Understand and ensure compliance with regulations and procedures as laid down by the Financial Conduct Authority (FCA), by keeping up to date with all changes in the regulatory framework