



<b>Position</b>	<b>Renewals Advisor</b>
<b>Reports to</b>	<b>Renewals Manager</b>

### **The purpose of your position**

The job of the Renewals Advisor is about managing client communications to provide a high quality of customer service, retain existing clients and increase the company's reputation and boost sales. Preparation of renewal documentation, contacting clients to renew their policies and setting up of the new policies play a major part in the Renewal Clerk's daily tasks.

### **The position requirements and responsibilities**

#### **Position key attributes**

- Enthusiastic, highly motivated team player
- Energetic, outgoing & confident with strong communications skills
- A commitment to providing good customer service
- Effective IT/ PC skills
- Excellent telephone manner
- The ability to quickly and accurately enter information, produce documentation, and supply information
- Good numeric skills and capable of multi-tasking
- Minimum of 4 GCSE's at Grade C and above, to include English and Maths
- Good attention to detail
- Professional and responsible
- Focused and self-motivated

#### **Main responsibilities**

- Maintaining the system for raising renewals, which should be actioned 3-4 weeks before the renewal date.
- Managing the departmental computerised diary system and produce renewal documentation.
- Chasing and receiving payments by cheque, credit card and debit card for renewals and policy amendments.
- Responding to enquiries from clients, brokers and underwriters received by phone, letter, email or fax and ensuring that all information required by clients or underwriters is obtained and communicated.



- Obtaining quotations, using quotations system, rating guides or by referring to insurers. Communicate quotations, advising the most appropriate in terms of price and cover to meet the applicant's needs and to ensure that at all times we are treating customers fairly.
- Discussing any additional covers to ensure that all the insurance requirements are satisfied
- Issuing invoices and policy documents and updating client records.
- Ensuring that the paper files and system records are updated and maintained following all client contacts.
- Providing a focused and friendly service to all customers and prospects providing quotations and assisting with queries, taking messages where appropriate.
- Processing incoming and dispatching outgoing mail.
- Produce and maintain diaries on our computer system, chasing for outstanding information from insurers, brokers and clients.

#### **Additional Responsibilities**

- Update the computer system with events, produce documents/correspondence as required.
- Communicating effectively both internally and externally in a professional and friendly manner.
- Maintaining an acceptable level of product knowledge by keeping up-to-date with product developments.
- Your hours of work will be 9.00am to 6.00pm Monday to Friday and 1 in 3 Saturdays 9.00am to 3.00pm, calculated on a rotating basis.
- To assist in achieving team targets and deadlines.
- To assist in the positive implementation of change, growth and development within the business.