

# Associate, Client Servicing

Business Unit	Professional Services	Department	Employee Benefits
Reporting Line	Senior Manager, Client Servicing	Location	Glasgow

## Role Overview

### Job purpose

Responsible for supporting the client adviser in servicing employee benefits arrangements. This is a fee earning but non-advisory role.

### Key Responsibilities

#### Client Services

- Deliver scheme support function for Group Risk & Healthcare clients to a high standard and in a timely manner.
- Draft written reports and letters relating to client specific cases
- Liaise with relevant parties including insurers, introducing firms, etc. to ensure that benefits are established in line with client requirements and scheme renewals are managed effectively
- Research product markets in connection with client specific requirements
- Obtain illustrations from insurers along with technical information, performance enquiries and general provider information
- Analyse raw data to assist advisers with client recommendations (at establishment & renewal)
- Identify and report any risks, breaches, or errors by ensuring risks are logged through to mitigating actions and controls
- Delegate work and activities to Assistants as appropriate to ensure most efficient use of resources
- Manage client requests, referring to Senior Manager and/or Advisers where appropriate
- Communicate with clients via telephone, MS Teams, e-mail, and in writing, in a timely and professional manner, and when required attend meetings to support the adviser
- Manage records and data appropriately and securely in line with company policy
- Ensure comprehensive client records are kept and that these are accurate and up to date at all times

#### Financial

- Ensure that all chargeable client work is recorded daily
- Organise the timely production of fee invoices and support adviser in managing WIP, debtors, and profitability of clients

#### Regulatory Compliance

- Meet all regulatory and departmental requirements

#### Business Development

- Assist with tender processes and onboarding activities where required

### Key Skills and Experience

- Excellent client service skills - previous employee benefits experience is essential for this role
- Proficient IT skills in core Microsoft Office systems.
- Excellent interpersonal and communication skills, both verbal and written

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- Experience of report and letter writing
  - Ability to prioritise work and delegate effectively
  - Ability to work both independently and within a team in pressurised environment, and must be able to use initiative

## Professional Qualifications and Education

- Excellent standard of education.
- Relevant professional qualifications an advantage, although not essential and/or a desire to further develop and to undertake relevant examinations.

## Key Competencies

- Analytical Thinking – ability to analyse client information and highlight requirements to make suitable recommendations
- Communication skills – ability to deal with stakeholders and be able to communicate clearly and professionally in writing and in person, produce concise, well-structured documents considering the requirements of the reader
- Customer Focus – enhance customer satisfaction and build long term trusted customer relationships
- Time Management - organise time effectively and prioritise work, meet deadlines and multi-task
- Teamwork - encourage effective teamwork and collaboration within department, support line manager with training and development needs of other team members and share best practices with colleagues.
- Technical Expertise: maintain high degree of technical awareness and keep up to date with technical developments and legislative changes

# Our Values and Behaviours

## Personal

- ★ We take time to listen to & understand people's individual needs
- ★ We treat everyone fairly & with respect
- ★ We are honest & genuine

## Performance

- ★ We are ambitious for our clients and act with their interests in mind
- ★ We keep our promises & deliver excellence at pace
- ★ We lead the way and embrace new ways of working

## Partnership

- ★ We build lasting, mutually beneficial relationships
- ★ We value everyone's contribution
- ★ We partner across the full breadth of our expertise to create shared value

# Consumer Duty

Understand and maintain awareness of your responsibility in relation to the Consumer Duty rules and expectations. Take personal ownership for your actions and be an advocate of Consumer Duty to ensure we deliver good outcomes to our customers, in particular, in relation to the expected Consumer Duty outcomes:

- **Products and Services** – Products and services are fit for purpose
- **Price and Value** - Price the customer pays for a product or service is reasonable compared to the overall benefits
- **Consumer Understanding** – Customers are given the information they need, at the right time, and presented in a way they can understand
- **Consumer Support** – Enable our customers to realise the benefits of the products or service they buy, pursue their financial objectives, and act in their own interests