



<b>Role description</b>	<b>Account handler £17,000 - £25,000</b>
<b>Hours of work</b>	<b>37.5 hours per week - Monday to Friday</b>
<b>Location</b>	<b>Ipswich</b>
	We aim to create an environment where employees take shared responsibility for their own individual effectiveness, personal and career development. All staff are required to participate in such systems of periodic reviews, training and staff development as may be agreed from time to time.
Reports to	Sales Team Co-ordinator [in case of dispute - MD, CEO, CIO, Marketing Director]
The Role	An Account Handler is a senior member of the Blyth Valley team responsible for building and maintaining the company's book of business.
Personal attributes	<ul style="list-style-type: none"> <li>• time management - follow the time frames within the procedures manual</li> <li>• positive enthusiastic attitude</li> <li>• team player - to always think of yourself and everyone else within Blyth Valley as being part of the same team</li> <li>• To be an ambassador for Blyth Valley in and outside of work</li> </ul>
Key responsibilities	<p>To take on this role, you must be capable of:</p> <ul style="list-style-type: none"> <li>• ensuring that your work is carried out promptly in line with the service level agreement</li> <li>• understanding the clients' business, risk profiles and clients needs</li> <li>• Identifying whether a risk can be underwritten on our binding authority or should be referred to underwriters</li> <li>• ensuring that policies are fully explained to clients</li> <li>• checking/issuing documents and quotation correctly</li> <li>• following up the quotation to sales</li> <li>• providing first class customer service at all times</li> <li>• building a relationship with clients and giving prompt attention to their requests: discussing what their future insurance needs might be and maintaining business contact with them</li> <li>• taking full and accurate telephone messages if another account handler is not available</li> <li>• acting as a referral point for administration/junior account handlers as and when required</li> <li>• demonstrating negotiation ability with underwriters and clients</li> <li>• developing new business and clients</li> <li>• identifying new trends and developments</li> <li>• retaining business at renewal</li> </ul>
FSA Compliance Responsibilities	<p>Blyth Valley's business activities are regulated by the Financial Services authority;</p> <p>As an employee of Blyth Valley, you are required to:</p> <ul style="list-style-type: none"> <li>• be aware of the importance of FSA compliance in respect of your activities</li> <li>• comply at all times with the requirements of FSA rules and be aware of the company's policies in respect of Treating Customers Fairly and Conflicts of Interest</li> </ul>



<p><i>Specialist knowledge</i></p>	<p>We also expect that you will (or will learn to in your probationary period): our product offering included in but not exclusive to, the following insurances:</p> <table border="0"> <tr> <td>Professional Indemnity</td> <td>Directors' &amp; Officers</td> </tr> <tr> <td>Employers' and or Public Liability</td> <td>Office Contents</td> </tr> <tr> <td>Portable equipment</td> <td>Buildings</td> </tr> <tr> <td>Business interruption</td> <td>Personal Accident</td> </tr> </table> <ul style="list-style-type: none"> <li>• understand the benefits of the above insurances and how they how they relate to the new professions (e.g. Marketing and Communications, IT, and Management Consultancy)</li> <li>• understand the benefits of the above and how they relate to other professions (e.g. Architects, Engineers, Surveyors, Estate Agents, Recruitment Consultants, Interior Designers)</li> <li>• understand the differences between the online and offline policies</li> <li>• understand when we can use our Binding Authority to self quote</li> <li>• understand the different payment options available</li> <li>• understand when we can use our Binding Authority &amp; claims payments</li> <li>• understand which of our panel of Insurers we use and when</li> <li>• understand how Claims are handled</li> <li>• understand Blyth Valley's innovative way of doing business and promote the company's brand values</li> </ul>	Professional Indemnity	Directors' & Officers	Employers' and or Public Liability	Office Contents	Portable equipment	Buildings	Business interruption	Personal Accident
Professional Indemnity	Directors' & Officers								
Employers' and or Public Liability	Office Contents								
Portable equipment	Buildings								
Business interruption	Personal Accident								
<p>General duties</p>	<p>While still maintaining the outstanding knowledge and service above you will:</p> <ul style="list-style-type: none"> <li>• maintain the procedures manual</li> <li>• show an understanding of core business areas and maintaining knowledge of the most suitable insurer</li> <li>• be able to recognise problems before they arise and offer solutions</li> <li>• handle claims competently while maintaining outstanding customer service</li> <li>• Escalate relevant claims to senior members of the team if there is not a satisfactory outcome</li> <li>• Distribute work evenly from the mail centres when required</li> </ul> <p>While still maintaining all of the above you will be expected too:</p> <ul style="list-style-type: none"> <li>• Handle difficult calls and rectify problems or identify when a problem escalates and the need for referral</li> <li>• Offer practical advice on developments and assist in development solutions</li> <li>• Show enthusiasm and commitment in meeting SLA's</li> <li>• Maintain your own workflow and assist others where necessary</li> <li>• prepare detailed reports</li> <li>• organise and attend meetings</li> <li>• carry out research into available insurance products and policies</li> <li>• undertake all other duties as reasonably required and directed</li> </ul> <p>Whilst maintaining all of the above you will:</p> <ul style="list-style-type: none"> <li>• be an ambassador for the company, taking responsibility of the office if line managers or senior staff are out of the office.</li> </ul>								



<p>Personal development</p>	<p>Your own personal development will be planned with your Sales Team Co-ordinator, we will expect that you:</p> <ul style="list-style-type: none"> <li>• study and attend training in order to further your technical and general expertise</li> <li>• complete the Broker Assess Training programme or</li> <li>• develop your own CPD plan (in consultation with your Team Leader)</li> <li>• complete targets/objectives set in your personal development review, within the time limit specified</li> <li>• develop a product expert area:           <ul style="list-style-type: none"> <li>○ Keep the team up to date with changes or developments in your expert area</li> <li>○ Present to the team at least twice a year</li> <li>○ Attend training to further your knowledge</li> <li>○ Lead projects relating to your product expert area</li> <li>○ Provide assistance if required, in developing systems</li> <li>○ Be available for UAT if required</li> </ul> </li> </ul>
<p>Reviews</p>	<p>Reviews are undertaken on a regular basis to help you develop in your role.</p> <p>Reviews during your Induction Period, will be carried out after:-</p> <ul style="list-style-type: none"> <li>• Weeks 1, 2, 3, 4, Month 2 and Month 3</li> </ul> <p>After a successful induction period, reviews will be carried out every:-</p> <ul style="list-style-type: none"> <li>• Six months</li> <li>• Annual 360 degrees review</li> </ul> <p>Ad-hoc reviews may be undertaken, as and when required.</p>
	<p>We may, when required, update and amend this job description from time to time.</p>