

Job Description

Job Title	Senior Client Service Executive
Responsible to	Head of Client Service Executives
Responsible for	
Summary of Role	<p>The key purpose of this role is to provide advice and excellent service to new and existing clients, negotiating with them and the insurance market to ensure the product(s) sold to them meet(s) their requirements.</p> <p>To retain clients and seek to cross sell any additional cover or gaps in existing cover by regularly reviewing products available and current client needs. To ensure that cover continually meets clients' requirements by conducting regular reviews of their needs. To provide a prompt and accurate service regarding any mid-term alterations requested by the client. To provide claims guidance and advice where appropriate</p> <p>To mentor and train Assistant Client Service Executives and Client Service Executives, as appropriate and carry out regular training reviews.</p>
Main Responsibilities and Duties	
1	Support Client Managers to ensure that client growth and retention targets are met by responding to requests for new quotations, adjustments and renewals - accurately obtaining all relevant information from clients and negotiating terms with Insurers
2	Ensure all client records are set up accurately and all appropriate data is transferred onto the computer system
3	Ensure all financial transactions are recorded on the computer system, quickly and accurately
4	Prioritise tasks as appropriate and monitor them to ensure all tasks are handled in a prompt and effective manner
5	Establish trusted relationships with clients and provide them with professional advice relating to their insurance needs
6	Develop relationships with partner Insurers which will assist in the retention and growth of our business
7	Adhere to FCA Regulation at all times
8	Adhere to specific Company Policies and Procedures at all time
9	To undertake additional duties as may be assigned from time to time
10	Uphold Vista's brand values inside and outside of the office
11	Provide support and guidance to colleagues requiring your help by mentoring them, identifying any training needs and providing training as appropriate