



Balens Job Description

Position: Junior Customer Service Administrator

Department: Affinities

Reporting to: Affinities Supervisor

Type: Full Time *

Level: Trainee

Role: Working within our Affinities Department assisting the Affinities Team in the administration of Insurance business, with specific focus on learning about Individual Health & Wellbeing Professional Insurance and providing excellent customer service.

Main Duties and Responsibilities:

- To manage the post for the Affinities Team including opening of incoming post and franking of outgoing post.
- Envelope stuffing for the Affinities team.
- General office/administration duties for the Affinities team i.e. photocopying, filing, printing and scanning for the Affinities team.
- Inputting of data to the Bexhill system to aid the renewals of direct debits.
- Changing addresses and names of the Balens Administration System (BAS) system for Affinities clients. Leading on to handling return post items for the team.
- Ensure all administration and recording is prompt and accurate – maintaining computer and manual records.
- Ensuring money is accurately banked and accounted for.
Work closely with other team members to ensure any client receives a prompt and efficient response.
- Transacting card payments on Realex for the Affinities team
- Under supervision, issuing insurance documents for the team.
- To input data onto BAS.
- Any other ad hoc support tasks for Affinities team members.
- To follow FCA requirements, including Treating Customers Fairly.
- To act professionally at all times and ensure the ethics and ethos of Balens are followed.
- Ensuring work is carried out with accuracy, confidentiality and deadlines are met.
- Working with all staff to get the right information at the right time.
- Undertake internal and external training courses as necessary, including study for and sit CII Exams.
- Deal with phone and email queries including automated renewals and chasers, such as Barcode Scanning, Awaiting Payments & Queries
- To provide excellent customer service to all clients.

Key Job Elements	Essential / Desirable
<p>Specific Skills required:</p> <p>Good Administration skills</p> <p>Good English language skills – written and spoken</p> <p>Good Mathematics skills</p>	<p>Essential</p> <p>Essential</p> <p>Essential</p>

<p>Qualifications and Training:</p> <p>5 GCSE's including English and Maths at grade C or above 2 A Levels passes at grade C or above Degree level training undertaken</p>	<p>Essential Desirable Desirable</p>
<p>Knowledge and Experience:</p> <p>Experience with Microsoft Office and Microsoft Outlook Experience within the Insurance environment</p>	<p>Essential Desirable</p>
<p>Personal Qualities:</p> <p>Ability to work as an individual with in a team Ability to work under own initiative High standards of work and attention to detail Good telephone manner Efficient Time management and Organisational skills Willingness to learn and embrace new systems To be flexible and able to adapt to changing circumstances</p>	<p>Essential Essential Essential Essential Essential Essential Essential</p>

* This is a full time position, with an expectation of 37.5 hours per week, unless otherwise agreed and stated in your contract.

Balens will support with payment for study material and exam entry for gaining Chartered Insurance Institute (CII) qualifications. Self-study will be required in order to achieve exam success. Please contact events@balens.co.uk for full details of how Balens supports with CII qualifications.