



BALENS
Specialist Insurance Brokers



Balens Job Description

Position: Assistant Commercial Account Handler

Department: Commercial

Reporting to: Commercial Manager

Type: Full Time

Level: Assistant Commercial Account Handler

Role: Working within our Commercial Department with responsibility for providing support to the Commercial Account Handlers and undertaking full training on scheme and/or open market business with the aim of progressing to a Commercial Account Handler

The Person: Balens require a self-motivated, committed individual ideally, with some commercial insurance experience who wishes to expand their existing knowledge and progress towards underwriting scheme and open market business, as directed. In addition, we will require good written and oral skills and require someone with the ability to work under their own initiative. Ideally, the person should be willing to learn and embrace new systems. A flexible approach is required as the role will be progressive and may change with the development of the department.

Main Duties and Responsibilities:

Account Handling

- To learn all scheme binder business as directed by the Commercial Manager, if applicable
- To provide full administration support to the Commercial Account handler.
- To learn all Policy Wordings and Underwriting Guides and be able to provide guidance on such, to clients and answer basic claims queries. To liaise with the Claims Department as necessary
- To review files and administer new business, renewals and mid-term adjustments for clients using binders and open market Insurers, as and when required.
- To meet all service standards for the handling of renewal, new business and/or MTA's as directed by the Commercial Manager
- To enforce Underwriting Guides for the Underwriting of scheme business, introduced into the department by the Commercial Manager
- Work closely with other team members to ensure any client receives a prompt and efficient response. To track cases as appropriate to ensure a satisfactory conclusion is reached.
- To maintain client relationships by providing excellent customers service. Ensuring work is carried out with accuracy, confidentiality and deadlines are meet.

- To assist with post and phone duties as and when required
- To deal with accounts queries, as directed
- To deal with bordereaux submissions and queries, as directed
- Deal with phone and email queries.
- To input cheques, credit card and or finance agreements onto the system.
- To input data onto the Balens Administration System as necessary.
- To follow FCA requirements, including Treating Customers Fairly.
- Deal with sub brokers as required within the course of the business.
- To act professionally at all times and ensure the principles at Balens are followed.
- Undertake internal and external training courses as necessary.
- To agree to undertake professional insurance qualifications as agreed with the Commercial Manager

Key Job Elements	Essential / Desirable
<p>Specific Skills required:</p> <p>Excellent Administration and Organisational skills Good English language skills – written and spoken</p>	<p>Essential Essential</p>
<p>Qualifications and Training:</p> <p>GCSE English and Maths 2 A' Levels passes at grade C or above Degree level training undertaken Willingness to undertake professional qualifications Willingness to attend training courses internally & externally Willingness to undertake training on Underwriting Guides and to learn the key points and to ensure these are enforced</p>	<p>Essential Essential Desirable Essential Essential Essential</p>
<p>Knowledge and Experience:</p> <p>Experience with Microsoft Office and Microsoft Outlook Experience within Balens Ltd or within the general Insurance Industry Knowledge of Commercial Lines products Basic understanding of FCA requirements</p>	<p>Essential Desirable Desirable 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>