

## Job Title: Senior Associate (Employee Benefits)

Reports To: Associate Director

Direct Reports: Between 1-5 Direct Reports

### 1. Role Specification

#### Key Purpose of Role:

The Senior Associate is primarily responsible for client administration as well as providing a broad range of support to the senior associates and insurance advisers in the provision of advice and the high-quality ongoing service to prospective, new and existing clients. The Senior Associate plays a key role in contributing to and enhancing the overall client experience.

#### Primary Responsibilities:

The role requires an individual who is experienced in working to deadlines, prioritising workload, project management and providing a high level of customer service at all times, and who can also train and assist the associates in the client services team.

#### Main Duties

Client Service Delivery

(Value – Make it Happen)

- Ensure that all relevant clients are set for the correct SLA:
  - All client claims are dealt with quickly and efficiently
  - Help prepare documentation for these renewals
  - Checking that the required servicing is carried out
  - Handling individual client renewals and service issues
  - General query handling and client liaison across various communication media
- Corporate client issue resolution
- Manage confidential and sensitive documents
- Maintain electronic filing systems
- Process reports and tracking progress of business

Achieve Good Client Outcomes

(Value – Lead from the Front)

- Interact with providers, clients and advisers (through email and telephone, and face to face)
- Ensure clients are treated fairly, in accordance with regulatory guidelines
- Ensure new applications are monitored and processed through to completion
- Liaise with product providers on new business applications, claims queries, pre-approvals, additions & deletions and all other adhoc queries

Staff Management and Working as a Team

(Value – Working Together)

- Cultivate the values and behaviours of AES within the organisation
- Work closely with colleagues to ensure that all clients receive excellent service
- To manage team workflow to ensure work is completed to agreed standards
- Hold regular 121's and appraisals with and otherwise manage Associates

### Achieve Performance Targets

(Value – Thinking with Purpose)

- To achieve agreed performance targets
- To participate in and/or support key projects and practice/technical initiatives across the business as required
- To achieve the right outcomes for clients

### Conduct

(Value – Be the Difference)

- Be a brand ambassador for AES and actively promote all services, our values and behaviours to ensure good client outcomes and meet our conduct responsibilities
- Take steps to pass examinations
- Keep abreast of all technical research, legislative and regulatory change and share knowledge with the team
- Ensure technical knowledge is up to date and that CPD requirement is met
- Ensure team complies with the regulatory and legal environment

## 2. Person Specification

### Knowledge and Qualifications

- Degree or equivalent qualification
- Cert CII
- Windows system, CRM and online systems
- 3-5 years' experience in the insurance industry

### Skills and Attributes

- Strong organisational skills
- Excellent communicative (written and oral) and interpersonal skills (presentational; listening; diplomacy; influencing)
- Clear commitment to an effective and efficient organisation
- Proven record of delivering all work accurately and on time and to agreed standards
- Ability to:
  - Think operationally, anticipate future consequences and trends and incorporate them into the organisational and/or team plans
  - Work effectively as a team manager
  - Relate well to staff across AES
  - Initiate projects and take responsibility for continuous improvement
  - Work under pressure and to tight deadlines

### Experience

- Results-proven track record of exceeding goals
- Proven track record of taking responsibility for ensuring delivery of outstanding service to clients
- Proven track record of effectively communicating with colleagues
- Where appropriate evidence-based examples of leadership and development of people
- Minimum 3 years' experience in related industry.

**APPLY**