



# Account Handler

## Applicant Information Pack

**Unity**   
Insurance Services

# The Role

<b>Responsible to:</b>	Insurance Operations Manager
<b>Directorate/Department:</b>	Commercial, Unity Insurance Services
<b>Base Location:</b>	Unity Insurance, Lancing
<b>Salary Band:</b>	£21,652      Band C
<b>Line Management Responsibility:</b>	N/A
<b>Budgetary responsibility:</b>	N/A
<b>External Contacts:</b>	People and organisations from the Scouting, Guiding and charity sectors. Suppliers and service providers, insurers and the general public
<b>Internal contacts:</b>	Director of Commercial, MD, senior managers and other Unity colleagues

*The above list is provided for guidance only and is not an exhaustive list of all the contacts with whom the post holder may be required to liaise.*

## Role Summary and Purpose

Act as a prime contact point for Unity's portfolio of clients comprising of individual Scout and Guide groups or other external small charity clients for their insurance requirements. Ensure efficient administration and management of their policies and the overall client relationships through excellent customer service. Additionally encourage them to purchase any additional insurance needs from Unity to meet the company's business objectives. Work on various new business campaigns to cross sell and up sell to existing clients. Responsible for achieving revenue targets for both retention and growth of existing business as well as incoming new business.

# Key Tasks

- Offer information, guidance and quotes to existing clients in respect of their insurance needs.
- Cross sell and up sell relevant products to existing clients.
- Offer information, guidance and quotes to prospects in respect of their insurance needs and converting these to clients.
- Achieve targets set in respect of existing client revenue retention, new business growth and lead generation and other key performance indicators.
- Administration of policies in line with the objectives of accuracy, speed and completeness, deal with all policy and client queries and achieve prompt and appropriate solutions.
- Collection of premiums income in line with Unity policies.
- Work as an effective member of Unity staff.
- Comply with all business and office procedures and FCA rules.
- Pro-actively review all insurance procedures in use and suggest continual improvements as part of Treating Customers Fairly initiatives.
- Processing and handling of claims for clients.
- Where authority is given under a delegated authority exercise due care in binding cover on behalf of insurers and stay within authority levels.
- Where authority is given under a delegated authority exercise due care in the issue of documents evidencing cover bound.
- Assist the Liability & Insurance Advisor with client indemnity agreements and provide advice on liability cover where appropriate.

# Person Specification



- Experience of youth charities and their insurance needs
- Experience of working in the commercial insurance industry
- Computer literate and experience of using insurance systems
- Knowledge and experience of FCA Compliance and TCF practices
- Must be able to demonstrate experience of insurance broking
- Must be able to advise on, sell and service all classes of commercial insurance products
- Professional insurance qualifications – Cert CII or Diploma in Insurance
- Positive attitude and ability to deal with difficult situations and customers
- Ability to develop solutions to customers insurance requirements
- Sales, influencing and negotiation skills to

achieve targets and best outcomes for clients

- Good customer service skills
- Team player
- Good communication and interpersonal skills
- Ability to work to targets
- Good organisation skills
- Ability to work to deadlines and/or under pressure

## Safeguarding rules - Yellow card

The post holder agrees to comply with the safeguarding rules as set out on TSA's yellow card at all times and be willing to undertake a DBS check.

## Benefits

☑ Holiday Entitlement: 25 days per year plus bank holidays. This increases after two years service to 28 days and after five years to 32 days. ☑ Additional Holidays: We operate an office closure during the Christmas and New Year holiday period that provides up to an additional 3 days of extra leave. ☑ London Weighting: In addition to a competitive salary we also provide London weighting to staff if located inner/outer London. Looking after your health and wellbeing

Simply Health Scheme You will have access to a medical scheme to help you with the cost of your everyday healthcare fully funded by the Association such as optical, dental and many more. You will also get access to the Gym discount, family days out discount and online health risk assessment.

Sickness absence we pay sickness above the statutory minimum requirement. (Above benefits apply to employees upon completion of three months in their role unless otherwise stated)

Looking after your future

Generous Pension Scheme

We are committed to providing our staff with a best work place pension scheme that is highly competitive in the third sector. For all employees, the Association has a Group Personal Pension Plan with the Scottish Widows.. This plan allows employees to contribute a minimum of 2% of their gross salary up to the maximum allowed within HMRC limits. The Association will contribute twice your contribution, up to a maximum of 10% of gross

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Salary Employees can benefit further by saving your own and the TSA National Insurance contribution that is paid into your pension pot.

Life Assurance All employees are covered by a scheme which pays four times the basic salary in the event of death in service.

Getting to and from work

Car parking All sites offer free car parking to employees.

Cycle to Work scheme This scheme is a form of salary sacrifice which enables employees to purchase a bicycle through the Government's Cycle to Work Scheme and can save you up to 42% on the retail value (depending on the employees tax bracket).

We are proud to be a family friendly employer

Personal Days Up to four personal days paid leave a year. Maternity/Paternity Leave We pay maternity leave above the statutory minimum requirement. Childcare Vouchers This scheme is a form of salary sacrifice, enabling employees to purchase childcare vouchers. Start and finish time Employees can apply for some flexibility on their start and finish times of work. Making your money go that little bit further

Scout Store purchases Employees can make purchases from Scout Store with a discount of 25% on certain items, excluding uniforms. Online Benefits Portal Our online benefits portal allows you to tailor make your own benefits package.

# How to apply

In order to apply for this role, please download and complete an [application form](#)

**Job Reference:** Lancing Jan 19

Please submit completed application forms by email to [jobs@unityinsuranceservices.co.uk](mailto:jobs@unityinsuranceservices.co.uk)

The closing date for applications is March 2019

If you would to discuss the role in more detail, please contact Insurance Operations Manager Phil Johnson at [Philip.Johnson@unityins.co.uk](mailto:Philip.Johnson@unityins.co.uk)