Balens Job Description

Position: Customer Service Administrator

Department: Affinities   **Reporting to:**   Affinities Supervisor

Type: Full Time *   **Level:**   CSA

Role: Working within our Affinities Department with responsibility for handling general insurance business for individual health and wellbeing professionals.

Main Duties and Responsibilities:

- Understanding the client's needs – Listen, apply knowledge, offer clients guidance, support and where applicable advice.
- To follow FCA requirements, including Treating Customers Fairly.
- Ensure all administration and recording is prompt and accurate – maintaining computer and manual records.
- Ensuring money is accurately banked and accounted for, includes processing cheques and transacting card payments on Realex.
- To act professionally at all times ensuring 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.
- Work closely with other team members to ensure any client receives a prompt and efficient response.
- Undertake internal and external training courses as necessary, and if applicable in your contract, including study for and sit CII Exams.
- Envelop stuffing for the Affinities team as required, as well as incoming post and franking out-going post.
- General office/administration duties for the Affinities team i.e. photocopying, filing, printing and scanning.
- Dealing with client queries via email, post and phone.
- Taking incoming phone calls from clients regarding queries, new business and renewals.
- To input data onto the Balens Administration System (BAS) as necessary, issuing insurance documents as applicable for the client/s.
- Processing refunds, transfers and calculating mid-term adjustments as necessary for the client.
- Changing addresses and names of the BAS system for Affinities clients.
- Dealing with automated renewals and chasers as applicable, such as Barcode Scanning, Awaiting Payments & Queries
- Any other ad hoc support tasks for Affinities team members as requested.
- If applicable, inputting of data to the Bexhill system to aid the renewals of direct debits and new business, as well as running arrears reports and processing cancellations.
- If applicable, processing new business cases and renewals for sub-brokers.

- If applicable, managing individual schemes, including processing memberships lists, issuing documents and working with the Association/Organisation directly.
- If applicable, running the Affinity fee process.
- If applicable, running the invoicing system.
- If applicable, maintaining Online New Business and Renewals, and chasing clients for additional information and payment
- If applicable, working on the Affinities Retention project.
- If applicable, processing and checking the incoming post to ensure information is passed to the relevant department is accurate.

Key Job Elements	Essential / Desirable
Specific Skills required:	
Excellent Administration and Organisational skills	Essential
Good English language skills – written and spoken	Essential
Good Mathematics skills	Essential
Qualifications and Training:	
CII FIT or above	Essential (depending on contract)
Knowledge and Experience:	
Experience with Microsoft Office and Microsoft Outlook	Essential
Experience within the Insurance environment	Desirable
Personal Qualities:	
Ability to work as an individual with in a team	Essential
Ability to work under own initiative	Essential
High standards of work and attention to detail	Essential
Good telephone manner	Essential
Efficient Time management and Organisational skills	Essential
Willingness to learn and embrace new systems	Essential
To be flexible and able to adapt to changing circumstances	Essential

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