

CRISPIN SPEERS AND PARTNERS LIMITED

JOB DESCRIPTION

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| Job Title: | Client Support Assistant |
| Reports to: | Manager - Corporate Accident & Health Products |
| Business Unit: | Accident & Health, Life & Specialty and/or Employee Benefits Flexible Benefits Division |

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| Job Purpose: | <p>This role would suit an individual with good organisational skills and attention to detail.</p> <p>It involves the responsibility, management and maintenance of core communications with clients along with the data processing and issuing documents to these clients and their employees. The role is pivotal in the maintenance of the service delivered to and support of our clients and customers.</p> |
| Key tasks: | <ul style="list-style-type: none"> • Calculation and processing of premiums from data spreadsheets received from Consultants and Clients. • Preparation and management of membership data, including amending the data to be in a consistent format for processing. • Issuing Membership confirmation of cover in a timely and accurate manner. • Preparation of risk renewal data for Account Handlers and Account Executives within time lines set out. • Departmental filing and archive filing, ensuring this is carried out in an accurate and timely basis, maintaining records as required accurately and tidily. • Answering general enquiry telephone calls and managing the department's email boxes and distribution as appropriate. • Production and organisation of Electronic Mailshots. • Providing general administration support to the department as required. |
| Skills and competencies: | <ul style="list-style-type: none"> • Self-motivated with a proactive approach to problem solving • Intermediate/advanced use of Microsoft Excel and Outlook • Organisation skills i.e. a neat methodical approach to working • Good Customer service and telephone communication as the role will involve discussion with Insured's and/or Clients, Underwriters and Assistance companies. • Attention to detail as print and document proofing is an important part of this role. • Ability to prioritise when under pressure • Flexibility with the ability to work alone and as part of a team. |

Other:

- Knowledge of Microsoft PowerPoint would be useful
- Support for other duties requested by senior management to fulfil the job purpose.