

CRISPIN SPEERS AND PARTNERS LIMITED

JOB DESCRIPTION

Job Title:	Client Support Assistant
Reports to:	Client Support Manager
Business Unit:	Employee Benefits Flexible Benefits Division/ Accident & Health, Life & Specialty

Job Purpose:	This role would suit an individual with good organisational skills and attention to detail. It produces information for a number of roles with specific areas of responsibility relating to monthly data processing and issuing documents to our Clients and their employees.
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.
	<ul style="list-style-type: none"> • Any other duties requested by senior management to fulfil the Job purpose.