

UTMOST WORLDWIDE LIMITED

JOB DESCRIPTION

utmost

JOB TITLE / POSITION:	Client Services Administrator
LEVEL:	Administrator
COMPANY / LOCATION:	Utmost Worldwide Limited / Guernsey
COMPANY PROFILE (BRIEF INFORMATION):	<p>PROFILE</p> <p>Utmost Worldwide specialises in offering life-insurance-based wealth management and employee benefit solutions to a global audience, including multi-national organisations, international expatriates and local resident populations in licensed territories.</p> <p>The company's head office is based in Guernsey, a premier international financial centre, and is a Registered Insurer under the Insurance Business (Bailiwick of Guernsey) law, 2002 (as amended).</p> <p>PRODUCT OFFERINGS</p> <p>A range of individual unit-linked regular and single premium-based savings, retirement and investment plans and an open-architecture portfolio bond along with retirement and savings products, Life and Disability and Healthcare products.</p>
DEPARTMENT / PROJECT NAME:	Client Relationship Management
PLACE IN ORGANISATION (REPORTING LINE):	The job holder reports to the Client Services Assistant Manager
ORGANISATIONAL CHART:	<pre>graph TD; CRM[Client Relationship Manager] --> CSA[Client Services Assistant Manager]; CRM --> SSTL[Sales Support Team Lead]; CSA --> SCRE[Senior Client Relationship Executive]; SCRE --> CRA[Client Relationship Administrator];</pre>

CHARACTERISTICS OF THE CURRENT POSITION / MAIN TASKS:	PERSISTENCY AND CLIENT SATISFACTION: <ul style="list-style-type: none"> › To issue pre renewals and rate reviews and deposit invoices › To monitor rate acceptance, discuss terms with the broker/client to conclude negotiations successfully. › To successfully chase debts and refer problem cases as appropriate › To monitor lost business and reason for cancellation › To develop a client centric approach within the team › To build relationships with brokers/clients and respond to simple technical queries in a timely manner › To liaise with other teams to ensure the client's needs are met › To promote use of our online service centre as appropriate › To ensure client specific documentation is kept up to date and correct › To assist the Client Relationship executives as appropriate TO ENSURE KPIS ARE ADHERED TO: <ul style="list-style-type: none"> › Renewal issued within six weeks of receipt of complete data › Debtors monitoring: referral to management as appropriate › Complaint monitoring: To acknowledge and refer complaints in a timely manner in line with the complaints procedure. › Respond to client queries within 2 business days
KEY RESPONSIBILITIES AND FUNCTIONS:	<ul style="list-style-type: none"> › To achieve a client retention rate of 85% plus on all clients › To monitor premiums due to ensure prompt payment of invoices and refer as appropriate › To co-operate with the wide UCS team › To collaborate with colleagues across both entities
SKILLS AND EXPERIENCE:	<ul style="list-style-type: none"> › Ability to provide high quality customers services with a professional, client focused approach and to add value to existing client relationships › Flexibility and adaptability to meet the clients and business needs › Excellent communication › Intermediate level experience of Word, Excel and Outlook software › Well organised and ability to plan work and meet deadlines set

Date..... Signed..... Approved..... Date.....