

Job Profile

Job Title	Client Service Manager	Name	TBC
Reports To	Commercial Managing Director	Region	T L Dallas Commercial
Location	London		

Purpose

The role is focused on managing the team of brokers within the London team, ensuring excellent customer outcomes which result in retention and growth across all Commercial Lines.

Success is delivered by working in partnership with the Head of Office and Teams, together with Compliance Officer, and Head of People and others to drive the organisational and cultural change allowing London to maximise the potential of its people and performance. There will be a requirement to review processes, improve MI reporting, and enhance the compliance, sales, and performance culture.

Key Accountabilities

- **Broker**
 - Work with Execs on New and Existing Business across all lines of Business
 - Handle delegated clients at renewal/MTA
 - Produce renewal reports/new business presentations
 - Highlight/assist in any upselling opportunities
 - Deal with general Commercial Broker duties from such as : Loading risk info on Acturis, End User report, Invoicing, Accounting and maintaining compliant
- **Financials & Reporting**
 - Work with Head of Office and teams to establish an ambitious but realistic budget.
 - Increase net rate & uptake of Premium Credit
 - Collate and supply accurate MI to HoO and teams, on financial performance and reasons for gaps (both positive and negative).
 - Collate new business, lapses, and difference in retained cases from teams across the UK to ensure learning and share best practice.
 - Work to ensure that there are only exceptional accruals at month end.
 - Manage debtors. To aim to reduce debt over 90 days to minimal amounts working with team leaders and office managers to do this.
- **People**
 - Implement reorganisation – Roles, key competencies, differentiation of roles.
 - Managing workloads across the offices / teams
 - Performance management culture to be embedded which is valued by the business and drives high performance through ensuring clear measurable objectives, effective feedback processes and active development plans. Provide advice/support to teams on matters of reward in its widest sense (formal & informal rewards) to achieve sustained high levels of motivation.
 - Training and development – Integrated training and development paths in conjunction with HR. Collaborate with HR to ensure training and development needs are met through the group training plan, it is delivered, information recorded appropriately and evaluated
 - Succession plans – developing a succession plan for the key posts within the teams. Identify the skill gaps between job requirements, incumbents and successors
 - Absence recording, Workplace One, Induction and exit processes

- **Processes**
 - Work with Group Ops Director to embed Acturis best practice
 - Design and implement processes in conjunction with Group Ops Director, teams, compliance for Corporate and Business areas, differentiating the service between the two teams.
 - Ensure renewal & MTA processes are timely and efficient.
 - Introduce / embed PRISMs where appropriate
 - Implement and monitor TLD's placement strategies working together with the Group Placement Manager

- **Compliance**
 - Carry out file / Acturis & technical audits / teams to conduct them where appropriate
 - Ensure TCF is embedded within the team culture
 - Insurer security in conjunction with Group Placement manager.
 - Up to date on sanctions register, and overseas business.

- **Quality of work output**
 - Work with Group Ops Director to embed Acturis best practices and processes inc presentations, registers etc.

- **Corporate governance.**
 - Make sure that the Data security regime is adhered to.
 - To retain a clear desk according to the Clear desk policy
 - Complaints Procedures
 - Complaints Flowchart
 - Financial Crime Policy – Included Anti Money Laundering
 - Financial Sanctions Procedures
 - Ant-Bribery & Corruption Policy – Includes Inducements
 - Conduct Risk Policy
 - Vulnerable Customers Policy
 - Financial Promotions & Approval Procedures
 - Fraud Policy
 - Bring Your Own Device Policy (BYOD)
 - Information Security Policy
 - GDPR Policies/Procedures

- **Technical guidance/referral**
 - To be a referral point for all brokers for technical insurance queries, with reference to Group Placement Manager on relevant issues

- **League Tables**
 - Working with the Head of Office to develop league tables for performance across the offices on; premium finance penetration, application of admin fees, debtors, new business results, retention performance, average size cases, and develop other metrics to create and facilitate a high performance culture

