

## **JOB DESCRIPTION**

### **Needham Insurance Services**

**Job Title:** Administrative Assistant

**Job Holder:**

**Reports To:**

**Date:** November 2020

### **Purpose**

The role is to provide support in all general office duties including post, telephone in accordance with company procedures and regulatory requirements.

### **Main Tasks**

Answer telephone and deal courteously with all callers, routing them as appropriate or taking messages.

Collect and despatch outgoing mail.

Produce and maintain diaries, chasing for outstanding information from insurers, brokers and clients.

Maintain secure, efficient and full access to paperless system

Update the computer system and produce documents when quotations are accepted.

### **Key Performance Indicators**

Accuracy of Data Input.

Accuracy of Documentation.

Complaint handling.

Maintenance of Diary.

Promptness in dealing with correspondence.

Promptness in returning telephone calls.

### **TCF - Customer Service**

Requirements:

- Highly developed sense of integrity and commitment to customer satisfaction.
- Demonstrated passion for excellence with respect to treating and caring for customers.
- Ability to communicate clearly and professionally, both verbally and in writing.

- Has a pleasant, patient and friendly attitude.
- Strong decision making and analytical abilities.
- Strong detail orientation and communication/listening skills.
- Willingness to work a flexible schedule and occasional overtime when needed.
- Possess a strong work ethic and team player mentality.

#### Responsibilities

- Professionally handle incoming requests from customers and ensure that issues are resolved both promptly and thoroughly.
- Thoroughly and efficiently gather customer information, access and fulfil customer needs, educate the customer where applicable to prevent the need for future contacts and document interactions through thorough note taking.
- Provide quality service and support in a variety of areas.
- Troubleshoot customer issues over the phone.
- Maintain a balance between company policy and customer benefit in decision making.
- Handles issues in the best interest of both customer and company.
- Continuously evaluate and identify opportunities to drive process improvements that positively impact the customer's experience.

The individual will provide information to customers in response to enquiries about products and services, in addition to assisting customers interested in opening accounts. The individual will receive, document and resolve customer complaints.