**Job Description**

**Job Title:** Case Manager

**Responsible To:**  Team Manager

**Main Purpose:** Manage insurance applications through to completion whilst providing the highest standard of service to our customers. Adopt a ‘sales through service’ culture to maximise income.

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## Specific Responsibilities:

To provide the highest possible standard of Customer Care.

Provide quick and accurate communication/liaison with customers, advisers and insurers.

Conduct yourself and all communication in a professional and empathetic manner.

Keep clear and accurate records of the progress of each application.

Manage own case load.

Assist with operational training of new team members.

Inform Team Manager of any potential problems or issues impacting the operation of the team, proposals or the business in general.

Maintain professional & technical knowledge by attending all available training and establishing personal networks.

Be innovative & forward thinking to continually improve company & team performance.

Be pro-active in identifying & sharing ideas to improve service levels & efficiency.

To conform to guidelines outlined in the Operations Manuals.

Complete regulatory training.

To be flexible with working hours according to business needs and carry out any other reasonable duties as required.

## Essential Skills:

* Deliver service excellence
* Ability to organise and prioritise own workload
* Basic computer skills
* Attention to detail
* Excellent communication, literacy and numeracy
* Results orientation
* Ability to work on own and within a team

## Desirable Skills:

* Cope under pressure
* Ability to develop and maintain good internal and external relationships
* Be innovative & promote continuous improvement
* Problem solving and judgment