



Role Profile

Job Role:	Client Service Co-ordinator
Reports to:	Operations Manager
Division:	Jelf Manson
Segment:	Healthcare

Purpose of the job:

To provide support to Healthcare Advisers/Consultants in order to provide a professional service to clients. To provide clients with day to day support with regards to their Healthcare policies.

What we expect you to do:

- Produce professional and complete documentation / correspondence in a compliant manner within timescales confirmed by Divisional Service Level Agreements.
- Take a pride in maintaining and auditing accurate and thorough records, including membership data, claims information and invoicing, paying particular attention to the need for cross referencing and checking details.
- Answer the telephone in a professional manner that aims to build rapport with clients, providers and colleagues.
- Demonstrate an enthusiasm and interest in gaining knowledge of additional Healthcare and Group products/propositions.
- Assist Healthcare Consultant in ensuring that all business activity is logged on core systems so that revenue can be accurately recorded and monitored.
- Work on own initiative and to prioritise client's enquiries effectively.
- To act as primary point of contact for client servicing issues, establishing effective relationships with clients. Where required, escalating issues to the Healthcare Consultant for resolution.
- To ensure the efficient production of all reports and correspondence to clients.
- Maintain professional relationships with clients, insurers and colleagues.

Qualifications

	Essential	Desirable
Professional	No	CII IF7
Maths and English GCSE or equivalent	Grade C or above	Grade C or above
Driving Licence - Car	No	No

How we expect you to behave

Professional

Your actions are considered and thoughtful and you deliver on time.

Effort

You approach tasks with energy and enthusiasm. You are proactive and positive in dealing with work matters and others. You take ownership for matters involving your allocated clients and endeavour to solve problems promptly and effectively.

Team

You display flexibility and are adaptable when the need requires. You endeavour to personally develop your skills.

Integrity

You keep promises and respect information and data with due discretion and confidentiality. You conduct yourself with an honesty and concern for others.

Group competencies – skill areas and how you apply them

Concern for Excellence

- Activates the highest standards of performance
- Faces every challenge with a “can do” attitude
- Committed to the achievement and maintenance of quality and accuracy
- Awareness of client relationships and of the importance of their input in maintaining relations
- Committed to exceeding client expectations
- Implements methods to improve own performance
- Receptive to new ideas and positive change
- Keen to take on additional responsibility to develop own skills/knowledge and to assist others
- Awareness of TCF and compliance guidelines with a pro-active attitude to attaining both
- Commitment to maintaining client relationships and demonstrating professionalism

Planning, Organising and Delivering

- Demonstrates ability to prioritize own workload and to work on own initiative to identify issues, define problems and implement solutions
- Focuses energy and resources on tasks that add value to a) own role and b) their team
- Demonstrates attention to detail in dealing with all client matters and an ability to consistently record accurate information
- Demonstrates ability to comply with processes and procedures as directed
- Actively maintains compliant and accurate records
- Owns effective practical methods to manage workload and can (as a result) access resources and locate information efficiently
- Acts on requests within agreed timeframes

Communication

- Communicates relevant information (both written and verbal) in a concise and effective way
- Meets deadlines and communicates information to others in a timely manner
- Produces accurate written communication to clients and shows ability to adapt format to client
- Readily contributes to the team meeting environment
- Establishes and effectively communicates a course of action to accomplish own goals and objectives (including the pro-active update of T&C file and review records)
- Establishes and effectively communicates a course of action to accomplish team goals (including the contribution of suggestions to benefit the team, coupled with a desire to take ownership and see suggestions through to delivery/conclusion)

Personal impact and team effectiveness

- Interacts with others in an effective and sensitive way
- Uses correct channels to escalate issues and obtain information
- Respects and appreciates the needs of and works well with others and demonstrates an awareness of team objectives/aims
- Maintains effective work behaviour in the face of setbacks or pressure. Remains calm, stable and in control of themselves
- Is dependable, flexible and punctual and takes a positive attitude to challenges
- Responds positively to training and to suggestions/advice from peers and superiors
- Demonstrates an understanding of the skills and knowledge held by peers and uses these resources effectively
- Takes ownership and responsibility for the outcome of all work undertaken
- Proactively participates in internal meetings
- Is positive and professional when working with colleagues and when introduced to clients/representing the Group on business.

Divisional competencies – skill areas and how to apply them

Client Service

Client management	<ul style="list-style-type: none"> Ensures that client requests and needs are satisfied responsively Looks for ways to improve service and build a rapport with clients Keeps promises made to client, consultant/team
Handling objections	<ul style="list-style-type: none"> Recognises dissatisfaction and deals with this swiftly by referring to Line Manager
Telephone techniques	<ul style="list-style-type: none"> Demonstrates a confident, professional and polite telephone manner. An ability to establish details with clients through questioning and to communicate messages clearly
Letter and report writing	<ul style="list-style-type: none"> Is conversant with all letters and templates in use by the team/on the system Can write a non standard letter

Sales

Jelf Group proposition	<ul style="list-style-type: none"> Has full understanding of the Group wide range of services/products
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IT skills

Acturis and LAMBS	<ul style="list-style-type: none"> Excellent practical knowledge of all aspects of the processes for managing clients and records Understand the data quality requirements for the Group Know where to find and how to interpret data relevant to the role
Outlook	<ul style="list-style-type: none"> Intermediate user
Word	<ul style="list-style-type: none"> Intermediate user
Excel	<ul style="list-style-type: none"> Intermediate user
PowerPoint	<ul style="list-style-type: none"> Basic/Beginner
Internet	<ul style="list-style-type: none"> Intermediate user
Goldmine (if relevant)	<ul style="list-style-type: none"> As defined by the Group

Technical competency

Administrative procedures	To have sufficient technical knowledge to complete your role to the required standards.
Products	
Compliance	
Claims	
Market knowledge	

Expected key performance indicators – measures of effectiveness

Business measures (Weighting 70%)	Team business objectives e.g. income, retention, SLA's Quality of files – SQA results Data quality results Contract certainty results Volume of account queries/corrections/rework Aged debt against target
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Individual measures (Weighting 30%)	360 degree feedback i.e. boss, acc. exec's, colleagues Letters of thanks/praise Complaints
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Personal authority

Expenses	None – refer to line manager
Complaints and redress	No authority
Signing	No authority to sign any legal, agency or supplier contracts
Commission income	No authority
Fee income	No authority to set fee levels
Administration charges	No authority to waive or change charges as set out by the division
Writing off debts	No authority