

## Relationship Manager

General & Medical specialise in Medical Insurance and we are now looking to recruit a driven individual who can work as a member of the team and contribute effectively in a professional manner across a busy office environment. You will need excellent communication skills and be able to organise your work effectively, managing key procedures in order to enhance existing, and develop longer-term business relationships. Through the provision of exceptional customer service, you will build an understanding of the future needs of customers and apply your knowledge and skill to find agreeable options. All product training will be provided but you will need to demonstrate the desire to succeed and the skill to communicate.

### Main Responsibilities of the Position

[jobs@generalandmedical.com](mailto:jobs@generalandmedical.com)

Building relationships with corporate clients, communicating by telephone and site visits to regularly review the service and corporate requirements.

Developing a good relationship with all clients by providing a personal service through undertaking regular contact calls with clients and through cross selling if appropriate to meet client requirements.

Working with other departments to generate regular monthly emails to enhance the relationship between customer and the business.

Sourcing opportunities to promote the business by researching health and wellbeing events or hospital open days.

Manage the renewal process on a monthly basis for all clients including corporate groups, correctly calculating renewal premiums taking into account claims history and other factors, ensuring that appropriate analysis of each client is carried out prior to printing documentation.

Understanding the cancellations and recovery process, improving systems where necessary and engaging with clients to retain business.

Skilful communications by phone, fax, email and written correspondence and by demonstrating capabilities to deal with a wide variety of contract types and medical issues.

Listening to and understanding the individual needs of each customer.

Recording accurately all events / details and actions relating to specific individuals on the database.

Monitoring reviews and proactively seeking feedback from new or existing customers.

Having an understanding of how the functions of the role interlink and benefit that of other roles.

Production of regular reports to support the business objectives and appropriate decision-making.

Monitor marketing strategies and their effects on quotes and consequent policy sales.

Monitor relevant broker business channels to shape follow-on action by sales personnel.

### What You Can Expect From Us

- Attractive Salary dependant on experience
- Monday to Friday regular hours
- Access to Pension Scheme
- Sick Pay Scheme and Attendance Bonus
- Great Annual Leave Benefit including additional family days
- Cash benefits linked to Personal Accident, Life Cover and Critical Illness
- Monthly Employee Rewards Scheme
- Commitment to Employee Learning and Development
- Access to Wellbeing Services and Discount Scheme
- Free tea, coffee and fresh fruit
- Friendly working environment in Peterborough, convenient location close to the A1

#### Renewal Process:

- Manage renewal process on a monthly basis ensuring that timescales are adhered to
- Analyse renewal report and make decisions on pricing in conjunction with guidelines laid out
- Aim to retain a minimum of 92% of clients at each renewal
- Complete renewal report on monthly basis
- Handle any potential cancellations and work to retain client's business

#### Client Management:

- Manage and provide a personal service to clients through two way communication by telephone, written correspondence and site visits when appropriate.
- Contact each allocated client prior to their yearly renewal to discuss their individual policy and work to retain their business
- Ensuring copies of all documents and letters which are sent out/issued are retained on the client file

#### Adhering to Regulations:

- Undertake Financial Conduct Authority (FCA) Training as required and keep up to date with any relevant regulation changes
- Ensure that own work is in accordance with set procedures and in such a way that it shows a full history of events, which are specific and evidenced
- Undertake Data Protection training as required and ensure working procedures adhere to the set regulations

#### Telephone System:

- Log all calls to the individual client record on the database

COVID-19 precautions are in place, including screens, social distancing, sanitisation and no sharing.

Our greatest strength is our people – professional, driven yet grounded and fun to work with. If our culture sounds like a good fit for you and you want to be part of our exciting journey then please send a copy of your CV to [jobs@generalandmedical.com](mailto:jobs@generalandmedical.com)