

JOB DESCRIPTION

Job Title: Account Executive **Level:** Grade 8SC

Purpose: Responsible for the administration of Group Risk policies, to ensure that all aspects of policy servicing are dealt with within agreed service and quality levels, whilst maintaining the highest level of customer satisfaction at all times.

Reporting To: Team Manager

Department: Group Business **Division:** Customer Services

Key Accountabilities:

- Prepare and issue Scheme accounts within service and quality level agreements in accordance with documented processes and procedures.
- Resolve written and verbal customer enquiries to the satisfaction of all parties within specified service and quality level agreements in accordance with documented processes and procedures.
- Where required request outstanding data from customers and follow-up where necessary to ensure records are current, and to enable efficient policy servicing.
- Maintain accurate Scheme records to ensure that the information used to deal with customer queries is correct and that the data held on our systems is accurate and conforms to company requirements.
- Keep up to date with process and procedural changes, ensuring consistent deployment and conformance to company requirements.
- Maintain work activity records as specified, to ensure the accuracy of Management Information.
- Establish and maintain effective customer relationships to help retain existing business And encourage growth
- Develop effective working relationships with other key Departments within Unum to enhance understanding of related processes and promote efficient work practices.
- Take responsibility for own development by actively seeking opportunities to improve own performance & ensure your agreed Personal Development Plan is progressed
- Actively participate in the continuous improvement process
- Ensure the continued protection of Unum's information, by following all applicable Information Security policies and procedures and by reporting suspected weaknesses in information security controls to the Information Security Officer.
- Understand how Treating Customers Fairly (TCF) and Risk Management relate to both your own role and your divisional activities and highlight any opportunities for improvement.

Behavioural Competencies:

- **Delivers Results.**
Sets high goals for personal accomplishment; works diligently to meet/exceed goals.

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- **Develops Self.**
Display strong capacity and thirst for learning and developing self; has keen self-awareness re: strengths and areas of development.
- **Good Judgment.**
Evaluates options by considering implications and consequences; chooses an effective option.
- **Strong Business Knowledge.**
Displays strong understanding of own department and good general understanding of overall business.
- **Strong Teamwork.**
Actively works collaboratively to help move the team toward the completion of goals.
- **Values Driven.**
Interacts with others in a way that gives them confidence in one's intentions and those of the organisation.

Required Knowledge and Skills:

Skills

- Use of appropriate systems: ALIS, GPAS, GROMIT, AWD, WORD, EXCEL & OUTLOOK.
- Use of appropriate equipment: Telephone, Printer, Photocopier & Fax Machine.
- Processes:
 - New Business set up
 - Issue accounts
 - Process customer enquiries
 - Update records
 - Policy Servicing

Knowledge

- An understanding of Group products.
- Knowledge of Policy servicing processes and procedures.
- Knowledge of Corporate Policies as outlined in the Compulsory Annual Training (money laundering, data protection, whistle blowing, risk management and complaint handling & TCF).
- Understanding of the customer feedback process.
- Knowledge of service and quality level agreements and related business targets.
- Basic understanding of processes in other area's within Unum and the impact and importance they have on servicing within ALIS as an integrated system.
- Knowledge of related regulatory requirements
- Understanding of the Balance Business Scorecard (BBS)

Training Requirements:

- Group Business Induction Course (initial introduction by GCR Training including products & processes & GCR systems)
- Corporate Induction course (3 months after starting run by HR Training)

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- Compulsory Annual Training (CAT) covering:
 - Data protection
 - Risk management
 - Complaint handling
 - Money laundering
 - Compliance
 - Whistle blowing
 - Health & Safety
 - TCF
- Ongoing products & processes & systems training

Minimum entry criteria:

- Experience within a customer-focused environment
- Administration experience (Financial Services experience desirable)
- Grade C or above in GCSE (or equivalent) in Maths and English
- PC literate, including Word and Excel