

JOB TITLE: Consultant Support – Healthcare (Employee Benefits)

REPORTS TO: Team Leader - healthcare

PURPOSE OF ROLE

- To undertake a lead support role to the Employee Benefits Consultants and Directors to ensure clients receive a consistent, high level of service and support.
- To ensure that client records are up to date and that internal systems and processes are followed.
- Support and develop junior team members to enable them to be as efficient and effective as possible.

KEY RESPONSIBILITIES

- Ensure a clear audit trail is maintained for all client records
- Ensure timely delivery of employee benefits scheme processing for group risk, group private medical insurance and other schemes/policies as required
- Provide administrative support for new, existing and complex schemes e.g. employee announcement letters
- Manage annual renewal and market reviews for all existing group risk schemes and healthcare schemes
- Prioritise and process group risk claims and healthcare claims queries and keep client and consultant up to date with progress
- Ensure bespoke compliance documents are accurate and up to date
- Organise and prepare for client pre renewal meetings
- Complete follow up actions from client meetings in line with instructions from Consultant, liaising with both client, insurer and provider as required
- Check and issue Policy Documentation
- Assist clients with the implementation of Employee Assistance Programmes
- Provide new business quotations for group risk and healthcare schemes
- Process Joiners, Leavers and answer client queries on healthcare schemes
- Issue monthly insurer invoices and updates to clients
- Draft proposition documents, reports and presentations for consultants
- Provide feedback to consultants, keeping them up to date
- Ensure IO and Corporate spreadsheet is up to date and opportunities are added and maintained regularly and correctly, in consultation with the Healthcare Consultant/Director.
- Liaise with consultants and clients to ensure all contractual obligations are fulfilled
- Support, train and develop junior team members to enable them to undertake tasks that will benefit the team and ultimately the client.
- Undertake project activity to ensure the efficient running of the office e.g. streamlining processes and documents, create framework for checking work, ensure templates/documents are updated and in the right place, workflow management.

PERSON SPECIFICATION

| | <i>ESSENTIAL</i> | <i>DESIRABLE</i> |
|-------------------------------|--|---|
| QUALIFICATIONS | <ul style="list-style-type: none">• RO1 regulation and ethics• IF7 Healthcare• GR1 | Progressing towards the diploma in insurance |
| EXPERIENCE | <ul style="list-style-type: none">• Good understanding of Becketts systems and processes for EB• Providing accurate and timely administration support | Development of others Experience of dealing with challenging situations |
| KNOWLEDGE | <p>Mandatory compliance training group risk and healthcare products. Knowledge of:</p> <ul style="list-style-type: none">• Private Medical Insurance, Group Travel, Group Dental, Cash plans, Group Life, Group Income Protection and Group Critical Illness Schemes & Employee Assistance Programmes• Insurer offers• Insurer systems | <ul style="list-style-type: none">• Knowledge of products and services Becketts advise on• IO |
| SKILLS & ABILITIES | <ul style="list-style-type: none">• Attention to detail/accuracy• Computer literate & data management• Analytical• Good organisation and prioritisation skills• Time management• Team working• Ability to build and maintain relationships• Communication – written and verbal• Ability to follow rules and procedures | <ul style="list-style-type: none">• Ability to effectively train and coach others• Mentoring• Leadership skills – motivating and inspiring others |
| PERSONAL ATTRIBUTES | <ul style="list-style-type: none">• Behaving in a professional manner• Trust and integrity• Curiosity & willingness to learn and improve | Commercial awareness |

KEY PERFORMANCE INDICATORS

- ✓ Accurate & timely information provided
- ✓ IO and Corporate Spreadsheet up to date
- ✓ Building Client Relationships
- ✓ Client satisfaction and zero complaints
- ✓ Positive feedback from colleagues
- ✓ Adherence to procedures
- ✓ Task management (diary)

MAIN CHALLENGES OF THE ROLE

- Manage the volume and prioritisation of work.
- Delivering a higher standard of service than competitors to retain clients and exceed the expectations of new clients.

SIGNATURES

I agree to the above description of my responsibilities.

JOB HOLDER:

Signature:

Print Name:

Date:
