

JOB TITLE: Client Support – Healthcare
(Employee Benefits)

DATE: 1 April 2023

REPORTS TO: Team Leader Healthcare

LINE MANAGE: N/A

PURPOSE OF ROLE

- To provide administrative support to the Healthcare consultants and clients, to ensure that they have timely and accurate information
- 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
- To broaden knowledge and experience across the breadth of employee benefits to fully support consultants

KEY RESPONSIBILITIES

- Ensure timely delivery of employee benefits scheme processing
- Provide administrative support for new and existing schemes
- Manage annual renewal and market reviews for existing schemes
- Ensure bespoke compliance documents are accurate and up to date
- Organise and prepare for client pre-renewal meetings
- Complete follow-up actions from client pre-renewal meetings in line with instructions from Healthcare Consultant, liaising with both client and insurer as required
- Assist in the preparation of reports and presentations for consultants
- Check and issue policy documentation
- Assist clients with the implementation of Employee Assistance Programmes
- Process Joiners and Leavers
- Maintain client records in keeping with current processes so that they are kept up to date
- Provide feedback to consultants, keeping them up to date
- Liaise with consultants and clients to ensure all contractual obligations are fulfilled
- Support, train and develop junior team members
- Undertake project activity to ensure the efficient running of the role e.g. streamlining processes and documents, create framework for checking work, ensure templates/documents are correct and in the right place, workflow management
- Maintain and update my talent development record, via the Beckett Academy App, ensuring my objectives are up to date and impact of any training is recorded

PERSON SPECIFICATION

	<i>ESSENTIAL</i>	<i>DESIRABLE</i>
QUALIFICATIONS	<ul style="list-style-type: none">• R01 Regulations and Ethics	<ul style="list-style-type: none">• IF7 Healthcare Insurance products
EXPERIENCE	<ul style="list-style-type: none">• Good understanding of Becketts' systems and processes for EB• Providing accurate and timely administration support	<ul style="list-style-type: none">• Training and development of others

KNOWLEDGE

- Mandatory compliance training healthcare
- Private medical insurance, group travel, group dental, cash plans and employee assistance programmes
- Insurer offers
- Insurer systems
- Knowledge of products and services Becketts advise on
- IO

SKILLS & ABILITIES

- Attention to detail/accuracy
- Computer literate and data management
- Analytical
- Good organisation and prioritisation
- Time management
- Team working
- Ability to build and maintain relationships
- Communication – written and verbal
- Ability to follow rules and procedures

PERSONAL ATTRIBUTES

- Behaving in a professional manner
- Trust and integrity
- Curiosity and willingness to learn and improve

KEY PERFORMANCE INDICATORS

- ✓ Accurate information provided
- ✓ Client satisfaction and zero complaints
- ✓ Positive feedback from clients and colleagues
- ✓ Adherence to procedures
- ✓ IO kept up to date
- ✓ Task management (diary)

MAIN CHALLENGES OF THE ROLE

- Manage the volume and prioritisation of work

SIGNATURE

I agree to the above description of my responsibilities.

JOB HOLDER:

Signature:

Print Name:

Date: