



## Job Description

**Job title:** Client Services Executive

**Department:** Real Estate

**Location:** Manchester

### Job role overview

To support Director and Account Executive to maintain a key client's Property & Construction Insurance portfolio, providing a high quality, professional and efficient service.

### Key responsibilities

1. Work with the client to understand their needs and identify the most effective cover for their requirements
2. Collate general and claims information and risk report for pre renewal and renewal meetings
3. Manage the renewal/placing process in a timely manner, obtaining renewal terms and quotes, highlighting potential risks and agreeing terms in line with client requirements including any mid-term alterations.
4. Confirm renewal/placing cover with insurers and Invoicing premiums.
5. Ensure accurate recording of information on Acturis
6. Deliver great customer service by responding swiftly to queries and concerns from clients, by telephone, email or letter, ensuring service standards are always met
7. Keep up to date with current market conditions and external factors affecting the Clients Business and sector
8. Monitor and report on performance against agreed targets
9. Ensure compliance with regulations and procedures as laid down by the Financial Conduct Authority
10. Keep up to date with all changes in the regulatory framework
11. Work with underwriters to amend policies where necessary in order to meet client demand
12. Act with integrity and always maintain Bridge reputation and standards

### The successful candidate is likely to have the following skills, attitude and experience

1. Experience within construction and property insurance (Likely to have been gained over a minimum of 3 years' experience)
2. Proficient use of Microsoft packages including Word, Excel and TEAMS
3. Minimum Cert CII / willingness to continue to progress towards Professional Qualifications
4. Excellent negotiation and communication skills with an ability to secure the best deals for clients and our business
5. Ability to develop and manage good working relationships with clients and insurers through building trust and mutual respect
6. Deliver great customer service by responding swiftly to queries and concerns from clients
7. Have good industry and sector knowledge, maintained through CPD.
8. Understand and ensure compliance with regulations and procedures as laid down by the Financial Conduct Authority (FCA), by keeping up to date with all changes in the regulatory framework