Job Specification

Payment Plan Adviser

Reporting to: Payment Plan Manager

Key Purpose

To provide exceptional service and advice to clients in order to maximise client satisfaction and achieve the Payment Plan growth & development targets in support of the business strategy.

Responsibilities

- Achieve individual objectives and key performance indicators as set and agreed
- Be pro-active and maximise all business opportunities working with all departments of Sales through effective outbound calling and cross selling in order to increase lead generation
- Manage relationships with assigned payment plan clients, including quarterly review calling
- Respond proactively to all allocated and inbound leads
- Process Accident & Emergency Insurance Stand-Alone Scheme
- Support the Payment Plan Account Executive; assisting when required with appointment booking and pipeline to maximise business opportunity and conversion
- Provide professional support and advice to clients ensuring high levels of service to include promotion of key benefits, exclusions and ensuring clients' needs are met and expectations exceeded
    - Support practices to set up plans, including marketing and growth
    - Answer and resolve queries relating to payment plans in a proactive, timely and positive way
- Ensure all payment plan administration is dealt with in a professional manner and within agreed timescales
    - Administer plans including new business, set up of new plans and liaise with The Printed Word to assist with development of client literature
    - Maintain accurate records on all relevant systems
    - Assist with payment plan notifications and reconciliation of payments and reports, inclusive of refunds, credits and BACS processes.
- Facilitate the management of the payment plan system and its efficiency with payment plans to include collections and client letters
- Maintain and develop own technical competence

- Support colleagues from all areas of the business as required

Responsibilities Specific to Senior Adviser

- To assist in the maintenance, monitoring and delivery of the core KPIs, processes and functions directly linked to team success
- Coach & develop team members
- Handle a variety of complex work and referrals
- Be proactive & analytical in day to day role and when liaising with the management team.
- Involvement with projects assigned by line managers or senior management team

Skills & Behaviours

- Demonstrate our values of Fun, Supportive, Professional, working in Partnership and Ambitious
- Ability to provide thorough payment plan reviews with association members
- Confident and capable of building rapport over the telephone and managing relationships to provide an excellent client experience
- An excellent administrator, quality orientated with a great attention to detail
- Organised, deadline driven, motivated and supportive of the wider team
- Ability to communicate effectively with others whilst working closely and flexibly
- Ability to work in a regulated, compliant and client focused environment
- IT literate

Qualifications

- Chartered Insurance Institute Certificate in Insurance