DAVID ROBERTS &PARTNERS GROUP

A bms. Group company

Account Handler - Employee Benefits
Stockport

About DR&P

David Roberts and Partners was formed in 1977. Founded in Ormskirk, before moving to Southport, the organisation has now grown into a family of independent insurance brokers. With businesses spanning the UK and Europe. We have a team of over 550 dedicated colleagues, we place over >£630m premium worldwide with direct access to Lloyd's of London and other specialist international markets. While our businesses operate at a local level, the Group's infrastructure empowers us to compete with and win against the multinational brokers. The objective is always to provide the best possible service and protection for our clients.

Following a sustained period of growth, where DR&P Group has acquired multiple insurance business and is continuing to grow both organically and through acquisition, the group is now embarking upon the next chapter following our acquisition by BMS Group.

About BMS Group

BMS is a dynamic, independent, global broker established in 1980, delivering specialist insurance, reinsurance, and capital markets advisory services. We are a global brand with offices located across the US, Canada, Latin America, Australia, Europe and Asia with both a strong, local focus and understanding of market needs.

Our teams are respected globally for their specialist market knowledge, intelligent analysis and insight. Our people strive to be 'the best in class' and with an innovative approach and their entrepreneurial thinking, our clients truly benefit from better solutions to policy development and placement.

Being independent makes a key difference to our clients, giving our brokers the freedom to deliver the best solutions, tailored to meet their business needs. Coupled with our collaborative team approach, single platform worldwide and renowned personal service, we are the independent broker of choice.

Summary of position

We are looking for an experienced Employee Benefits professional to manage, retain and develop an existing portfolio of individual and micro-SME clients which may also include ongoing administration support with policy and claims queries.

Key responsibilities & accountabilities

Account Management:

- Developing a clear understanding of customers' requirements
- Collate, analyse and present market quotations in line with client's requirements
- Identify cross sell opportunities within your market and for the wider Group
- Deal with client queries (verbal and written) in line with service level agreements and liaise with insurers where necessary to deliver on this
- Monitor insurers' performance and challenge them to resolve any issues
- Ownership of delivery of tasks and proactively managing your workload
- Contribute to accurate budgeting, forecasting, and revenue tracking for the client portfolio

Policy, Process and Procedures:

- Update all internal systems as per process ensuring we remain compliant
- Follow process and best practice that is relevant to your role and compliant with business policy
- Fully understand the need for accurate client data including contacts, existing portfolios, markets, and partners
- Embrace technology to deliver outstanding client solutions and are happy to:
    - constructively suggest process improvements to deliver workable solutions
    - challenge wider processes to enable and drive improvements to service

Focus and Relationships:

- Able to build strong internal, client and insurer relationships aligned to our values
- Provide exceptional client experience, ultimately forging long lasting relationships resulting in high retention levels

- Work closely with all internal colleagues to ensure that we collaboratively meet our clients' expectations and support with retention & growth opportunities

Compliance and Personal Development

- Actively undertake personal development to ensure up to date knowledge and understanding of best practice
- Aware of the need and sources of compliance and how to apply this in your role
- Operate in an honest, professional, and ethical manner
- Successfully complete all relevant regulatory training, ensuring you remain competent to carry out the role

What we're looking for

Experience / Qualifications

- Experience of working within the Employee Benefits industry encompassing all products with a focus on Private Medical Insurance (including associated benefits)
- Group Risk experience desirable but not essential
- Experience in client service delivery
- Be Cert CII qualified or agreeable to becoming qualified

Skills / Behaviours

- Solution driven
- Strong attention to detail
- Ability to work under pressure and to strict deadlines, and adaptable to changing priorities
- A good communicator, with the ability to write in a professional manner
- A strong team player
- Strive to deliver high standards of work for the benefit of your clients

What's in it for me?

- A highly ambitious team that works collaboratively to achieve your personal and professional goals whilst being a significant contributor to the overall success of the organisation
- 25 days holiday+ 1 day birthday leave (+8 recognised public and bank holidays)
- Company Pension Scheme
- Company Social Events
- Discretionary annual bonus linked to the business hitting KPIs
- Life Cover
- Medicash Cash Plan
- Income Protection
- Access to Cycle to Work Scheme

Through our Diversity, Equity and Inclusion (DEi) vision, we are committed to 'building a culture of belonging for all, valuing diverse perspectives and embracing authenticity.' As such, we have created our 'BMS Together' programme, with dedicated training, collaborative committees and intentional partnerships. In support of our ESG vision, we offer two additional paid days each year to take part in charitable work.

Please let our team know if you require any adjustments to support you through the application process.