

Personnel Specification: Client Advisor

Criteria	Essential	Desirable
Qualifications & Professional Development		
Certificate in Insurance (Cert CII) or willingness to achieve within two years of appointment	✓	
Commitment to maintaining Continuing Professional Development (CPD) and professional competence	✓	
Membership of the Chartered Insurance Institute (CII)		✓
Experience		
Minimum of three years' experience within the general insurance industry	✓	
Experience of advising clients on personal lines insurance products	✓	
Experience of managing renewals, quotations, mid-term adjustments (MTAs) and policy administration	✓	
Experience of working within FCA regulated environments	✓	
Experience of achieving service, retention or sales targets	✓	
Experience of cross-selling insurance products and identifying business development opportunities		✓
Knowledge		
Good understanding of general insurance products and markets	✓	
Knowledge of FCA Handbook requirements, Consumer Duty and Treating Customers Fairly (TCF) principles	✓	
Understanding of insurer placement processes and delegated authority arrangements	✓	
Knowledge of premium finance and insurance accounting processes		✓
Skills & Technical Competence		
Excellent verbal and written communication skills	✓	
Strong client relationship and stakeholder management skills	✓	
Ability to assess client needs and recommend appropriate insurance solutions	✓	
High levels of accuracy and attention to detail	✓	
Strong organisational and time management skills with the ability to prioritise workloads	✓	
Competent user of Acturis, Microsoft Office and other relevant insurance systems	✓	
Ability to analyse information and make sound commercial decisions within delegated authority	✓	

Criteria	Essential	Desirable
Behaviours & Personal Attributes		
Demonstrates honesty, integrity and professionalism	✓	
Customer focused, committed to delivering excellent service and positive customer outcomes	✓	
Collaborative team player who supports colleagues and contributes positively to team objectives	✓	
Commercially aware, recognising opportunities to improve client outcomes and business performance	✓	
Adaptable, resilient and solution focused	✓	
Committed to continuous learning and personal development	✓	
Other Requirements		
Willingness to travel occasionally to other offices, clients or training events where required	✓	
Flexibility to meet reasonable business and operational requirements	✓	
Right to work in the UK and ability to satisfy all pre-employment screening requirements	✓	