

Commercial Centre Executive

1. Take incoming phone calls for insurance quotations and support of quotations.
 - a. Obtain sufficient information from the caller to identify their requirements and provide a quotation for insurance which fulfils their requirements, using the company's enquiry forms, computer system and individual questioning techniques.
 - b. Provide the caller with adequate information about Pantaenius and the available insurances.
 - c. Answer the caller's insurance related questions, explaining cover and exclusions, and provide professional advice within the scope of own knowledge.
2. Prepare written quotations for yacht and superyacht business using the company's computer systems, check and obtain authorisation for (if necessary), and issue quotations in accordance with company procedures and personal authority limits, as set out in personal authority statement.
3. Handle emailed/written/website generated requests for quotations to the same standards and procedures as telephone quotations.
4. Follow-up quotations, providing additional information and answering questions as necessary.
5. Attend boat shows both within the UK and internationally and be able to work in other group offices, as may reasonably be required to meet the needs of the business.
6. Check and process new business applications, ensuring compliance with all conditions of the quotation, and issue documentation and invoices.
7. Create and maintain electronic client files in accordance with company procedures.
8. Assist existing clients with mid term adjustments, queries, policy updates and amendments for all of the company's product lines.
9. Assist with renewal amendments, processing and issuance as required.
10. Develop prospects with new third party introducers (agents/brokers/dealers/associations/yacht clubs), create opportunities for increasing business and maintain relationships with existing business to business partners.
11. Knowledge/experience of boats/yachts and the ability to read and assess surveys as part of the risk assessment process, provide comment and advise the client as necessary would be an advantage but is not essential.
12. Experience in handling or placing insurance would be a significant advantage.
13. Personal Development
 - a. A minimum industry qualification of Cert CII is within 12 months of commencement of employment. In addition you will be required to achieve the 'Diploma in insurance' within a further 3 years
 - b. Participate in 'in-house' and external training courses as required.
 - c. Develop a CPD program and identify and participate in CPD activities, including regular scanning of industry and yachting press.