

ROLE PROFILE

Role Title	Case Handler
Role Purpose	To effectively manage cases in ways that provides administrative support to a professional and ever growing claims management process
Line Manager	Case Handler Team Manager

Role Responsibilities and Accountabilities

- ✓ Take responsibility for your cases you are managing
- ✓ Liaise with third parties in ways that facilitates the completion of activities required to successfully complete a claim
- ✓ Develop and maintain good professional relationships with your designated customers and establish ways of communicating with them to ensure that they remain up to date regarding the progress of their claim
- ✓ Accurately log all correspondence received from a Vendor (bank or other provider) or customer
- ✓ Ensure that; the agreed follow-up actions are completed, relevant and informative notes are left on the system and that all data is entered accurately
- ✓ Work in ways that facilitates the resolution of claims in a timely and effective manner
- ✓ Identify concerns or issues relating to individual claims and implement actions that resolve such matters effectively
- ✓ Develop and maintain a good working knowledge of all regulatory obligations such as DPA and Venerable Customers
- ✓ Identify and escalate concerns, worries and/or issues to your Team Leader in a timely and effective manner
- ✓ Manage and prioritise your own workload in ways which facilitates achievement of the Company’s targets and/or Service Level Agreements
- ✓ Develop and maintain your own personal knowledge of Company policies, processes and procedures
- ✓ Act in an ethical and, when needed, compassionate manner when dealing with customers
- ✓ Undertake any reasonable duty as requested by a member of management

Key Skills and Experience

- ✓ Previous and proven experience of managing own “case load” Previous and proven experience of working in a customer service role
- ✓ The ability to work alone or as part of a team to achieve targets, complete projects or resolve business issues/concerns
- ✓ An excellent understanding of MS Word, Excel and Outlook
- ✓ Flexible in their approach to work and is able to adapt to an ever changing environment
- ✓ Excellent verbal and written communication skills
- ✓ Excellent numeracy skills
- ✓ An eye for detail and the ability to maintain/improve standards

- ✓ Excellent organisational skills and demonstrates the ability to work in a fast pace environment

Competencies*

- ✓ Team Working
- ✓ Problem Solving/Using Initiative
- ✓ Assertiveness
- ✓ Planning and Organising
- ✓ Customer Support
- ✓ Communication Skills

****Please refer to the full competency framework for further details***