



APPENDIX A - JOB DESCRIPTION

IDENTIFYING INFORMATION

Job Title:	Customer Support Associate (Membership & Insurance)
Department:	Customer Operations
Reports to:	Lisa Ripley, Head of Customer Operations

JOB SUMMARY

Harry Hall International Limited is a rapidly expanding distributor of equestrian insurance and looking to strengthen its team, it's a perfect time to join the company, make your mark and be part of its success. Conduct and culture and putting the customer at the heart of the Harry Hall business has resulted in the company's rapid growth so if you are passionate about helping people, have an eye for detail, a team player then this role is perfect for you.

Who are they?

They are passionate about helping people, has an eye for detail, a team player and a solid understanding of FCA principles and practices and what it means to work for a regulated entity.

What we need them to do?

Be a passionate, multitasker guiding customers over the telephone, via email, webchat for Harry Hall Insurance Products and One Club Membership.

Why?

When anyone is feeling lost, confused or generally a little bit bewildered about something, chances are they'll ask for clarity, dealing with customer queries and questions (as well as the odd complaint), they need help to resolve any issues and all with a smile and ensuring the high standards of ethical behaviour Harry Hall expects from its team.

Be a team player in a team that serves customers by providing product and service information, resolving product and service problems.

KEY RESPONSIBILITIES

- Provides information to new customer prospects on Harry Hall Insurance Products and One Club Membership
- Assists new members/insurance customers by processing their product purchase via the Harry Hall on-line portal
- Following up quotes/enquiries
- Processing MTA's
- Customer file reviews, maintains customer records by updating account information
- Handling inbound queries, providing customers with any necessary help and information they need after they have purchased a product from us



- Following up renewal queries
- Actively promotes the harryhall.com web site and the wider membership benefits
- Complaint and concern handling in line with company process
- Handling vulnerable customers with sensitivity
- Puts the customer at the heart of what they do ensuring the right outcome for the customer
- Participate and embrace staff training and coaching. We assist all customer facing colleagues to maintain and develop their knowledge through our online training portal and actively encourage any colleagues who wish to progress formal insurance qualifications.

KEY SKILLS AND EXPERIENCE

- Previous experience of client facing insurance distribution essential (min 12 months)
- Compliance knowledge (TCF, Vulnerable customers and Complaints)
- Acts with high levels of integrity, puts the customer at the heart of what they do
- Proficiency in CRM systems
- Proficiency in MS Office applications
- Excellent communication, questioning and listening skills
- A good idea for detail
- A polite and friendly manner
- Lots of initiative
- A positive attitude
- Team Player
- The ability to think on your feet
- Decision-making
- Planning and organizing
- Flexibility
- Stress tolerance

All newly appointed staff will undergo a thorough induction to ensure the company provides the skills, knowledge and expertise necessary to fulfil the role and ensure a solid understanding of the company's expectation in relation to Conduct, Product, TCF, Vulnerable customers, Complaints handling.

Harry Hall has a training competence scheme to support employee development and actively supports career progression.

Sanction and credit checks will be undertaken prior to the individual starting employment.