# Direct Life RGB - 314px

**Job Description**

**Job Title:** Case Manager

**Responsible To:**  Administration Team Leader

**Main Purpose:** Convert Life Insurance applications into policies on risk by the efficient administration of life insurance proposals and excellent customer service – to include existing policies. Provide quick and accurate communication/liaison with customers, advisers and Insurers. Communicate requirements and decisions and handle all objections to maximise policies on risk.

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**Specific responsibilities**

Check downloaded information after submission in line with procedures and update systems and records accordingly.

Liaise with customers, advisers and Insurers to ensure case status and required action is clear and accurate at all times, including database records.

Keep an accurate diary record and future pending in line with procedures to ensure any outstanding information is chased regularly, and proactively, including phoning, by letter, e-mailing, texting clients, advisers or third parties such as GPs, as necessary.

Respond to all case updates, and obtain updates from Insurer sites, and action in line with the above.

Log acceptance terms and risk dates immediately upon receipt.

When dealing with rated cases, inform customer and advisers of available courses of action to maximise risk dates.

Keep the Administration Team Leader informed of any potential problems or issues impacting the operation of the team, any proposals or the business in general.

Setup case details on online systems as required including adding products.

Assist with the opening and distribution of daily post as required.

Record daily workloads and contribution, updating line management by the required deadlines.

To conform to regulatory and cultural guidelines as set by management e.g. Treating Customers Fairly (TCF), Data Protection, Health and Safety and EEC, Quality and Service Excellence, Financial Crime, Money Laundering and Complaint handling.

Identify improvements to, and make suggestions for, improving processes for customers and the business.

To provide the highest possible standard of Customer Care, within response times to meet Customer needs and satisfy business demands.

Conduct yourself and all communication in a professional and empathetic manner, securing ‘sales through service’ including answering all customer enquiries.

Show flexibility and carry out any other reasonable duties set by the Dept Manager; including assisting with other Depts or training colleagues.