

**ROLE TITLE: Customer Consultant - Servicing**  
**FUNCTION / BUSINESS UNIT: FPI UAE Branch**  
**GRADE: B/A**

**REPORTS TO: Customer Servicing Manager**  
**DATE: January 2016**



ROLE	NEED TO DO	NEED TO KNOW	NEED TO BE
<p><b>PURPOSE AND CONTEXT OF THE ROLE</b></p> <p>This role is for an individual to work with in the Policy Servicing Team and who will be responsible for contributing to the processing of post policy administration and handling enquiries in relation to policy servicing to meet with the agreed service level, accuracy and company requirements.</p> <p><b>ROLE DIMENSION</b></p> <p><b>ACCOUNTABILITIES/ OUTPUTS</b></p> <ol style="list-style-type: none"> <li>1. Handle incoming enquiries and servicing issues on policy servicing matters</li> <li>2. Handle policy servicing transactions – screening of policy servicing requests, follow up on outstanding requirements, prepare endorsement (if any) and notice to policyholders, perform quality check and maintain record of policy servicing transactions.</li> <li>3. Service Standard Commitment – assist to achieve the required service standard for policy servicing and claims.</li> <li>4. Perform any ad-hoc projects/tasks as assigned.</li> <li>5. Ensure regulatory requirements are adhered to (including TCF, DPA and Group Data requirements)</li> <li>6. Problem investigation</li> <li>7. Working towards becoming fully skilled in all Policy Servicing functions</li> <li>8. Increase daily productivity in line with career progression whilst also ensuring quality standards are maintained</li> <li>9. Perform any ad-hoc projects/tasks as assigned.</li> <li>10. Participate in user acceptance testing where</li> </ol>	<p><b>OUTCOMES</b></p> <p>All work completed within service standard</p> <p>All work produced to a high standard of accuracy</p> <p>All work is completed within an agreed timeline</p> <p>No adverse complaint or dissatisfaction from internal and external customer</p> <p>Number of compliments from internal and external customer</p> <p>Feed in to relevant projects</p> <p><b>KEY PERFORMANCE INDICATORS</b></p> <p>Productivity Reports  Quality results  End to End process results  360 Feedback from TM and team  VNB</p> <p><b>SYSTEMS AND CONTROLS:</b></p>	<p><b>SKILLS/KNOWLEDGE</b></p> <p><b>Essential:</b>  Qualifications – Post secondary or higher</p> <p>Skills – computer literacy with working knowledge of MS office applications</p> <p>Skills – Strong verbal &amp; written communication skills</p> <p>Knowledge – knowledge of insurance products and operations and policy servicing</p> <p>Experience – Proven experience and evidence of operating in financial industry or in a Customer Services Environment</p> <p><b>Desirable:</b>  Qualifications – U graduate or above; FLMI or ACS</p> <p>Skills – non medical underwriting</p> <p>Skills - Analytics</p> <p>Knowledge of the international protection &amp; investment marketplace.</p> <p>An understanding of the product offerings of international competitors (local and offshore) and unique selling points of each.</p> <p>Interpersonal skills – ability to work in a core team to ‘get the job done’ and build effective relationships.</p> <p>Strong attention to detail</p> <p><b>EXPERIENCE</b></p> <p>1-2 years’ experience in the life</p>	<p><b>OUR MISSION:</b></p> <p>To support our customers at their moments of vulnerability, life events and provide them with the right solutions to enhance their financial security.</p> <p><b>OUR VISION:</b></p> <p>To be the life company and employer of choice</p> <p><b>OUR VALUES:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Customer-Centric</b></li> <li>▪ <b>Collaborative</b></li> <li>▪ <b>Inclusive</b></li> <li>▪ <b>Innovative</b></li> </ul> <p><b>OUR BEHAVIOURS:</b></p> <ul style="list-style-type: none"> <li>▪ We own ‘End to End’</li> <li>▪ We do it today, not tomorrow</li> <li>▪ We are empowered to challenge ourselves and each other</li> <li>▪ We respect, recognise and reward effort &amp; results</li> <li>▪ I lead by example</li> </ul>

ROLE	NEED TO DO	NEED TO KNOW	NEED TO BE
<p>applicable.</p> <p>11. Problem investigation</p> <p>12. Build strong relationships with the sales and relationship consultants</p> <p>13. Identify continuous improvement ideas to improve customer/distribution channel experience and process efficiency</p> <p><b>DIRECT REPORTS</b></p> <p>None</p> <p><b>RELATIONSHIPS (INTERNAL &amp; EXTERNAL)</b></p> <p><b>Internal:</b> Sales and RC team New Business &amp; Servicing teams Finance Global Contact Centre Group Stakeholders UAE MD</p> <p><b>External:</b> Financial advisors Customer Banks Diligenta (IT service) Regulator (s)</p>		<p>insurance/financial services industry in a customer service environment, with 1 years' experience in new business</p>	