

JOB TITLE: Client Relationship Manager

MAIN PURPOSE OF JOB

To manage the commercial relationships with assigned clients, delivering training and consultancy services as required. To provide support to Customer Relationship Managers and Account Directors by preparing and delivering training and consultancy as required. To deliver investigative support and feedback on escalated issues to clients or colleagues as required.

POSITION IN ORGANISATION

- Reports to Team Leader
- Advises clients on appropriate business strategies
- Manages client projects to achieve business objectives
- Interacts across the company to progress resolution of escalated issues
- Delivers application and product training to clients.
- Provides input to assist with the skill development of colleagues

SCOPE OF JOB

- **Customer Relationship Management** – manage business relationships with assigned clients and provide support to the management of client relationships
- **Income Generation** – maximise revenue opportunities with assigned clients through the promotion of CDL products and services
- **Business Development** – maximise business opportunities through influencing assigned clients business strategy
- **CDL System and Application Knowledge** – maintain and demonstrate an in-depth knowledge of the CDL applications and core products
- **Application Training/Consultancy** – deliver appropriate training and consultancy services to clients
- **Internal Coaching and Mentoring** – actively participate in the development of colleagues
- **System Development** – identify and propose system enhancements to meet client requirements
- **Process and Standards Development** – encourage a positive approach to customer relationship management throughout the department

DIMENSIONS AND LIMITS OF AUTHORITY

- Can negotiate pricing and terms with assigned clients
- Manages client projects to delivery
- Manages resolution of escalated issues
- Identifies and participates in design and testing of product and system enhancements

QUALIFICATIONS

- Educated to A-level standard or equivalent relevant experience
- Industry recognised qualification would be preferred

- 2 – 3 years CDL application knowledge preferred

EXPERIENCE

- Has a background in a customer relationship management role
- Preparation and delivery of commercial presentations to prospective and existing clients
- Promotion of system and/or process enhancements
- Providing an input into the developing of colleagues within the same business discipline
- Knowledge of broking software packages, word processing skills and an understanding of accounts packages would be advantageous

DUTIES AND KEY RESPONSIBILITIES

Client Relationship Management 30%

- Maintain an awareness of the general insurance marketplace.
- Maintain regular formal contact with assigned clients to ensure awareness of key business drivers and corporate plans.
- Manage reported issues from assigned clients and resolve complaints.
- Project manage client initiatives such as the introduction of new modules and schemes
- Proactively encourage clients to maintain up to date knowledge of system capabilities and best practices

Income Generation 20%

- Negotiate annual support charges with assigned clients and support the activities of SCRMs as requested.
- Maximise income and revenue from assigned clients through the promotion of CDL products and services.

Business Development 10%

- Produce detailed revenue and cost proposals, as required, for assigned clients and support the activities of the SCRMs as required.
- Proactively manage clients to upgrade to new versions of software as applicable and encourage investment in regular application training.
- Support SCRMs and Account Director activities through delivery of input to proposals and client facing activities as requested

CDL System and Application Knowledge 10%

- Develop and maintain an in-depth knowledge of the CDL application software and associated products.

Application Training and Consultancy

10%

- Provide training in all aspects of the core CDL application software, including special modules and associated products.
- Demonstrate the core CDL application software and associated products as required.
- Provide input to client's to assist with user acceptance testing.
- Provide consultancy services and advise customers on the best way to utilise the system to promote their products.

Internal Coaching and Mentoring

10%

- Pro-actively assist with development of CDL application and product specific skills across the department.
- Provide support to colleagues to help ensure high quality delivery of assigned tasks.

System Development

5%

- Identify and promote system enhancements that will benefit the CDL client community.
- Contribute business domain knowledge to internal projects as required.

Process and Standards Development

5%

- Ensure that identified client contact protocols and agreed procedures are followed encouraging a professional approach to client relationship management within Acc Dev.