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| **Job Title** | Relationship Executive aka Partnership Executive |
| **Reporting to** | Partnership Manager / Partnership Development Manager |
| **SMCR/CERT role** | N/A |
| **Department** | Commercial Team |
| **Revision Date** | June 2024 |

**Position overview**

Based in Colchester as part of the commercial team the Partnership Executive (PE) will be responsible for supporting the team in the management of key business relationships, whilst simultaneously identifying new business opportunities to grow any business relationships. The role will cover legal expenses both BTE & ATE as well as assistance schemes such as home emergency.

**Essential Job Functions**

*Partnership Management and Support*

* Working in correlation with the Partnership Managers team to maintain the day to day operation of all client partnerships
* Maintaining regular contact with specified clients either at meetings, by telephone or via another medium as appropriate
* Liaison with other departments to obtain all required information for client meetings and ad hoc client requests
* Attending client meetings to ensure all of their requirements are fulfilled to their satisfaction including post contract launch, change and renewal/review analysis
* Production and management of meeting minutes and producing action plans following any client meeting
* Production of bespoke claims and underwriting performance material in advance of client meetings and as requested on an ad-hoc basis
* Analysing claims experiences and providing clients, underwriters and other business functions with detailed commentary of the underlying performance of the client partnerships, such as: -
  + Past, current and developing claim trends
  + Identifying the impact that internal and external market factors may have in future
  + Identifying product and service development opportunities
* Input to the recommendation of any renewal terms to the Underwriting team with reference to agreed pricing models and existing schemes performance
* Identifying and exploring new business opportunities with existing clients and/or their partners including product development
* Drafting underwriting papers for submission to Underwriters
* Liaison with the Marketing team over presentation of proposal documents
* Preparing and submitting proposals to clients
* Preparing product training to client’s sales team to help increase sales conversion and to client’s claims, underwriting and customer service team to help build knowledge and awareness of the services we provide.
* Ad hoc project work
* Ensuring all duties carried out in accordance with company procedures and FCA regulations.

*Management Assistance*

* Providing assistance to the Head of Partnerships and Directors as required

**General**

* To carry out all work in accordance with agreed service standards and FCA regulations
* Comply with procedures, policies and regulations as relevant to remit.
* Ensure you complete all mandatory and job specific training requirements in line with the required time frames.
* Complete the required number of hours of Continuing Professional Development (CPD) as it pertains to your role and applicable qualifications and ensure this is logged in Workday.
* Fully participate in all applicable fitness and proprietary and Performance Review processes.
* Promptly advise your line manager/HR as to any matter that may be relevant and/or impact your ability to perform in your role.
* Other duties may be assigned in order to meet the on-going needs of the organisation

**Key Performance Indicators**

*Firm’s Objectives:*

Arc Legal Assistance is one of the UK’s leading providers of legal expenses insurance. Our business model for legal expenses insurance involves outsourcing the legal conduct of claims to top quality law firms. An over-riding principle is maintaining high standards of honesty and ethics in all that we do. Other key elements of our business objectives include:

* Provision of market leading products and services
* Service excellence, technical expertise, rapid response and clear and straightforward communications
* Investment in systems and infrastructure to support all areas of the business
* Strong financial management and close control of costs
* Ensuring profitability for Arc and our commercial partners
* Treating customers fairly

**Qualifications, Experience and Competence**

*Experience and Functional/Technical Competencies*

* Education / Key Skills
  + Numerate and literate.
  + Good understanding of the B2B relationship management.
  + Good analytical skills.
  + Good people skills – ability to communicate and build rapport.
* Essential
  + Excellent verbal and written communication
  + Excellent organisational and time keeping skills
  + Confidence to own tasks without supervision
  + Experience of using all Microsoft Office programs – specifically with knowledge and confidence of working on Excel
  + Keen to develop a career in an insurance environment
* Desirable
  + Good investigative and research skills
  + Working knowledge of ancillary insurance products
  + Degree Educated
  + Relevant previous work experience
  + Previous experience of managing relationships.

**Core Behavioural & Professional Competencies**

**Results Driven:** Displays energy, determination, and a sense of urgency to get the job done; understands the importance of meeting deadlines to achieve objectives; takes responsibility for organising own workload to ensure goals are met; identifies barriers or issues that might impact adversely on getting the job done and is proactive and innovative in resolving problems and finding solutions; strives for excellence.

**Adaptable & Open to Change**: Demonstrates a willingness to adapt and change according to circumstances; is able to comfortably handle ambiguity and changes in priorities; identifies the requirement to demonstrate flexibility for the wider benefit of the department and the business; supports change and the drive to continuously improve.

**Relationship Management & Customer Focus:** Builds and maintains strong internal and external customer and other relationships as relevant to role; is able to effectively understand and support customer needs while balancing business needs; takes responsibility for meeting agreed service levels and other commitments.; strives to deliver excellence and innovates to deliver solutions; ensures that everything that they do complies with all Treating Customers Fairly (TCF) principles.

**Risk Management:** Is able to understand and identify common types of business risks for their functional or business area; actively supports the maintenance of an effective control environment; takes timely remedial action as may be required to prevent or minimise loss; proactively escalates risks to the appropriate party; supports continuous improvement in the management of risk.

**Collaboration:** Demonstrates respect and integrity in all collaboration with others; works with rather than competes with others in the business to achieve company goals; builds trust through open communication; adapts style and messaging appropriately; seeks out and listens to the opinions of others; supports team building and an inclusive culture that values diversity.

**Continuing Professional Development:** Proactively keeps up to date with regulatory and professional changes; maintains the required knowledge and skills to perform in post and undertakes all required / mandatory training; ensures that annual learning and development plans and Continuing Professional Development (CPD) obligations are achieved.

NOTE: This job description is not intended to be all-inclusive. Employee may perform other related duties as negotiated to meet the on-going needs of the organisation.