

JOB TITLE	Client Services Associate
JOB REFERENCE	CS001
DEPARTMENT/TEAM	Client Services

OUR HISTORY

Hansard Global Plc is a listed company on the London Stock Exchange since 2006. The focus of the Hansard group is the international sale of life assurance products with a primary focus being on unit-linked products to ex-patriate customers based in various countries around the world. There is a truly global feel to Hansard, with a workforce based across the Isle of Man, Ireland, Malaysia, and Japan working together to achieve our goals.

Please visit [Hansard.com](https://www.hansard.com) for further information.

THE ROLE

We are currently recruiting for a **Client Services Associate**, to work within the Hansard Administration Services Ltd. Operations department. The successful candidate will be part of a Client Service team based in the Isle of Man. The department is responsible for all aspects of product administration and relationship management.

The Client Services Team plays a vital role in managing a diverse range of inbound client and advisor queries, including calls and written correspondence. This team is responsible for handling queries, providing detailed information, and resolving issues promptly and professionally. They serve as the primary point of contact for clients and advisors, ensuring that all interactions are courteous, informative, and aligned with the company's service standards. Additionally, the team meticulously documents all communications, updates client records, and ensures that follow-up actions are taken in a timely manner.

The Client Services Team is dedicated to delivering a high standard of customer service and satisfaction. They work closely with other departments to escalate complex issues and ensure that client and advisor needs are met efficiently.

KEY RESPONSIBILITIES

- Deal with queries from clients, both internally and externally via telephone or written communication
- Perform KYC reviews of client files ensuring regulatory requirements are met and managing the client transaction from start to finish where necessary or on an ad-hoc basis if required
- Actively contribute to the successful delivery of the departmental objectives along with your own personal business objectives and performance development plan
- Be a team player and contribute to the “one team” approach across all of Client Services
- Take ownership of and resolve any queries through to a satisfactory conclusion
- Support ongoing reviews and updating of procedures within the team and department
- Responsible for the accurate and efficient completion of administrative tasks provided
- Support our approach of full ownership of customer and adviser queries from receipt until the customer’s expectations have been satisfied
- Ensure pending work is reviewed, chased and closed within expected timescale
- Proactive, solutions-based approach to understanding issues which arise, and able to implement actions according to administrative policies and Procedure
- Timely and professional contact with stakeholders should be maintained at all times
- Assist in developing, implementing and sharing best practices
- Contribute to a proactive working culture
- Be part of an innovative culture to problem solving
- Take personal responsibility for data integrity

PERSONAL AND PROFESSIONAL REQUIREMENTS

SKILLS AND EXPERIENCE	ESSENTIAL OR DESIRABLE	METHOD OF ASSESSMENT
1-2 years of experience in customer service or a related field.	Essential	CV/ Interview
Experience in handling external telephone calls and emails with both clients and independent financial advisors	Essential	CV/Interview
Highly self-motivated individual who is willing to participate and actively assist in improving current processes	Essential	CV/ Interview
Strong verbal and written communication skills in English	Essential	CV/ Interview
Ability to manage and prioritise own workload in a fast-paced environment and be able to make decisions within the remit of their role	Desirable	Interview
Be passionate about delivering excellent customer service	Essential	Interview
Previous experience in Life Assurance or a similar customer service-based industry	Desirable	CV/ Interview
Experience with New Business/ Payments /Policy Serving	Desirable	CV/ Interview
Demonstrate an inquisitive nature and willingness to highlight any concerns, particularly relating to KYC and CDD	Desirable	CV/ Interview
System Knowledge		
Competent in Microsoft applications: Including Word, Outlook, SharePoint and Excel	Essential	CV/ Interview
Knowledge of Finscan	Desirable	CV/ Interview

OUR VALUES AND BEHAVIOURAL COMPETENCIES

We are passionate about how we do things at Hansard and in supporting an environment where our people can thrive.

Built around our core values of **Respect, Integrity, Quality, Trust** and **Innovation** and guided by our behavioural competencies, it's important that you play your part in supporting our Culture and execute your key responsibilities in line with these Values and Competencies.