



JOB DESCRIPTION

Job Title **Client Services Specialist**
Reports to Cheyne Fynn

Aim of role

In this role you will be responsible for providing excellent service to our clients and advisers as well as providing administration and support services. An important aspect of this role is customer retention and providing the best solution to customers.

The role requires diligent time management, great communication skills, strong administration skills and the ability to operate collaboratively and positively in a team.

Key activities

Client Services

- Retention
- Answering inbound calls
- Answering inbound emails
- Responding to general enquiries from members and advisers
- Formulating Adviser Agreements
- Setting up new advisers in the system and updating changes to current advisers
- Producing client listings
- Processing requests relating to funeral fund
- Managing reinsurance queries
- Attending to all payment enquiries, generating payment letters and quality checking payments, emails and letters
- Processing of payments and refunds
- Processing of dishonoured/declined payments same day
- Processing all general member requests
- Actioning Group Renewals
- Processing of Annual Renewal letters
- Reporting
- Writing Letters
- General administration
- Ensure all work is processed within Service Level Agreements
- Contributing at huddles, team discussions and training sessions
- Being a positive role model across NobleOak.



Our culture

An important aspect to this role is to help us drive a positive, engaging, and disciplined implementation culture.

The four key elements of our culture are.

1. **Be “Noble”** – At NobleOak, we offer genuine value to our clients. We are honest at all times and put our clients, policy holders, potential clients and alliance partners (including advisers) first, providing professional, friendly, fast and responsive service.

2. **Deliver** – We deliver results, not excuses.

We meet all promises to our clients and to each other and plan and execute very well. We work as a united team with open communication.

3. **Adapt** – We are responsive to change, drive continual improvement and contribute to new ideas and initiatives.

4. **Simplify** – We are down to earth, and communicate in a simple, clear and engaging way. We avoid jargon where possible.

Our vision is

To better protect Australians and their families, by providing more affordable and accessible life insurance.

At NobleOak we only recruit people who believe in our vision of providing genuine value and great quality service to customers, to ensure they are better protected.