

Job Title:	Customer Product Advisors	Reports to:	Head Business Devt. Corporate. & Grp Insurance
Unit:	Bancassurance	Department:	Bancassurance
Grade:	Contract Sales Staff	Date:	
Job holder:		Supervisor:	
Signature:		Signature:	

Job Purpose Statement

The Insurance Implant will be stationed at the client's premises to provide dedicated, on-site support on all insurance-related matters. This role bridges the gap between the client and the insurance provider, ensuring seamless service delivery, risk advisory, claims management, and product awareness. The implant will act as the first point of contact for all insurance queries, fostering strong relationships and driving customer satisfaction.

Perspective	Output
Client Relationship & Support	<ul style="list-style-type: none"> Serve as the primary on-site liaison between the client and the insurance provider. Respond promptly to customer insurance queries and provide professional guidance. Ensure smooth communication and coordination of all insurance processes.
Policy Administration	<ul style="list-style-type: none"> Support in policy documentation, renewals, endorsements, and cancellations. Monitor policy expiries and initiate timely renewals. Ensure accurate record-keeping of all client insurance policies.
Claims Management	<ul style="list-style-type: none"> Guide customers on claims procedures and documentation requirements. Coordinate with insurers, loss adjusters, and underwriters to expedite claim settlements. Track claims progress and provide regular updates to clients.
Training & Awareness	<ul style="list-style-type: none"> Conduct awareness sessions for the client's staff on available insurance products. Educate customers on benefits, exclusions, deductibles, and claims processes. Promote uptake of relevant insurance covers to address customer needs.
Risk Management & Advisory	<ul style="list-style-type: none"> Identify potential risks within the client's operations and advise on appropriate insurance solutions. Provide insights to improve risk mitigation and reduce claim occurrences. Liaise with underwriters to ensure policies are aligned with client risk exposures.

Reporting & Feedback	<ul style="list-style-type: none"> • Prepare and share monthly/quarterly reports on policy status, claims updates, and emerging client needs. • Collect client feedback and escalate to the insurer for continuous improvement. • Track revenue performance and highlight cross-selling/up-selling opportunities.
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Job Dimensions

Reporting Relationships: jobs that report to this position directly and indirectly	
Direct Reports	None
Indirect Reports	None

Stakeholder Management: key stakeholders that the position holder will need to liaise/work with to be successful in this role.	
Internal: Asset Finance Retail Staff All Internal staff	External: Insurance Companies Clients

Decision Making Authority /Mandates/Constraints: the decisions the position holder is empowered to make <i>(Indicate if it is Operational, Managerial or Strategic). Please also highlight any budgetary control responsibility if applicable for the role.</i>
Operational

Work cycle and impact: time horizon and nature of impact (Planning) <i>(e.g. Less than 1 week, 2 weeks, 2 weeks – 1 month, 1month – 3 months, 3-6 months, 6-12 months, above 1 year)</i>
2 weeks – 1 month

Ideal Job Specifications
Academic: Bachelor's degree in a business related field, preferable B.Com Insurance, Accounting, Finance and/or Actuarial Science
Professional: Diploma in Insurance (Preferred) Minimum COP requirement
Desired work experience: At least 3 years' experience in Business Development preferably in the insurance industry

Ideal Job competencies**Key Objectives**

1. Strengthen client confidence and trust through on-site presence and timely support.
2. Improve efficiency in insurance servicing, policy management, and claims handling.
3. Drive awareness and uptake of relevant insurance products among client stakeholders.
4. Enhance customer experience and satisfaction through seamless service delivery.
5. Provide actionable insights to both client and insurer on risk and insurance gaps.