

## JOB DESCRIPTION

### ROLE HOLDER:

<b>ROLE TITLE:</b>	IQED Case Handler	<b>DATE:</b>	
<b>BUSINESS UNIT:</b>	Operations	<b>VERSION:</b>	1/31.08.11
<b>REPORTS TO:</b>	Team Leader	<b>LOCATION:</b>	Cardiff

### PURPOSE

To ensure that cases received are dealt with from beginning to end within the business in an efficient manner and within SLA. To take ownership for individual cases as these are submitted and see these through to a successful completion.

### DIMENSIONS

- Achieve Competence within agreed timescales.
- Have a good working knowledge of IQED products.

### PRINCIPAL ACCOUNTABILITIES

1. To accurately process instructed cases in line with IQED procedures and customer centricity across department specific disciplines.
2. To contact clients/patients/third parties verbally and in writing, to progress cases through the business.
3. Ensure that all instructions and related procedures are actioned within agreed timescales, without compromising standards with regards to accuracy, consistency and compliance. Ensure that the principles of customer centricity and treating customers fairly are embedded.
4. To identify and highlight any trends, risks or other concerns that may be raised whilst processing a case to the Business Development Team.
5. Establish good working relationships within IQED and with IQED Customers in accordance with the principles of Treating Customers Fairly and maintaining effective, efficient and consistent channels of communication.

6. To demonstrate a full understanding of the business processes, procedures, relevant product knowledge and systems so that accurate and appropriate information is given at all times.
7. As required, participate in project work, mentor colleagues and represent the business in relevant forums, workshops and meetings.
8. To meet all requirements of the quality audits within IQED.

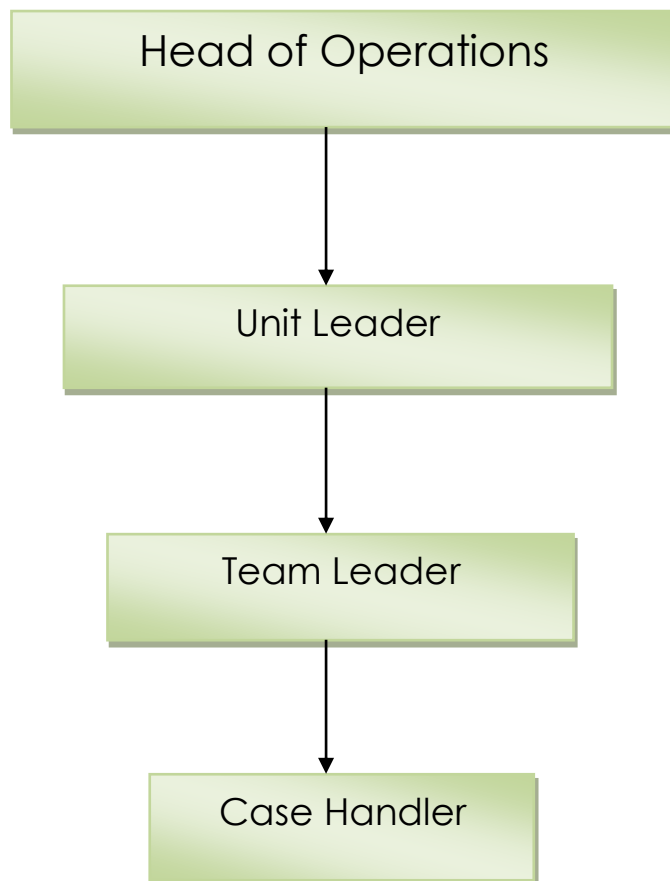
### Declaration

It is a requirement of IQED that its employees are aware of and conform to legal requirements in all activities, both internal and external. Implicit in this is that all managers and staff not only conform to the appropriate standards in terms of Health and Safety, but also work to the highest standards of business ethics.

JOBHOLDER ..... DATE .....

LINE MANAGER ..... DATE .....

## ORGANISATION CHART



## **CAPABILITIES FOR A CASE HANDLER**

<u>Capability</u>	<u>Capability Level</u>
Customer Orientation	Level 2
Respect for Others	Level 2
Communicating & Influencing	Level 2
Working Together	Level 2
Understanding Others	Level 2
Achievement Drive	Level 2
Flexibility & Change Orientation	Level 1
Analysis & Judgement	Level 1
Creativity	Level 2
Developing Others	Level 2
Commercial Awareness	Level 1

## **KNOWLEDGE & SKILLS FOR A CASE HANDLER**

<b>Knowledge</b>	<b>What exactly is required? (Where appropriate, demonstrated via monthly PAL)</b>
Product Knowledge <ul style="list-style-type: none"> <li>• IQED</li> <li>• In Market</li> </ul>	<ul style="list-style-type: none"> <li>• Detailed knowledge of IQED products and the distribution methods for those products</li> <li>• Knowledge and understanding of the UK Personal Injury market.</li> <li>• Be aware of influences, which may impact on IQED &amp; the team.</li> </ul>
Regulatory	<ul style="list-style-type: none"> <li>• Abide by the principle of customer centricity in line with the treating customers fairly initiative.</li> <li>• Be aware of regulatory issues and use the knowledge in order to identify areas of potential risk.</li> <li>• Understand and comply with DPA, Money Laundering Prevention, Complaints and Breach procedures.</li> </ul>
Departmental Structure	<ul style="list-style-type: none"> <li>• Awareness of key team responsibilities and interaction of each business area within IQED.</li> <li>• Understand structure within IQED, plus key players and stakeholders</li> </ul>
System	<ul style="list-style-type: none"> <li>• Demonstrate competence on all IQED systems relevant to the role</li> </ul>
Customer Awareness	<ul style="list-style-type: none"> <li>• Be aware of the key business drivers of IQED's Business Development Team.</li> <li>• Integrate IQED's Customer Centricity and Treating Customers Fairly principles into your role</li> </ul>
Qualifications	<ul style="list-style-type: none"> <li>• Achieve additional qualifications should they become mandatory for the role</li> <li>• Evidence ongoing competence by Continued Professional Development</li> </ul>
Processes	A working knowledge of: <ul style="list-style-type: none"> <li>• IQED Training &amp; Competence Requirements</li> <li>• Customer Centricity &amp; Treating Customers Fairly</li> <li>• Business Development</li> <li>• Complaints processes</li> <li>• Money Laundering Prevention Process</li> <li>• Breach &amp; DPA Processes</li> <li>• Comprehensive knowledge of the end-to-end IQED processes</li> </ul>

<b>Skills</b>	<b>What should be demonstrated? (Demonstrated via monthly 121's)</b>
Attention to Detail	Able to: <ul style="list-style-type: none"> <li>• Accurately assess communications from a client and take the appropriate steps to process the case at each instructed point.</li> <li>• Maintain acceptable quality audit results</li> </ul>

Analysis	<p>Able to:</p> <ul style="list-style-type: none"> <li>• Appropriately collect, interpret and question data.</li> <li>• Critically review processes and suggest alternatives (where appropriate)</li> </ul>
Judgement	<p>Able to:</p> <ul style="list-style-type: none"> <li>• Reach a conclusion based on the facts.</li> <li>• Propose a course of action or recommendation without excessive deliberation.</li> <li>• Prioritise work effectively</li> </ul>
Communication	<p>Able to:</p> <ul style="list-style-type: none"> <li>• Ensure written and verbal communications are clear, warm and concise</li> <li>• Persuade, influence and manage expectations</li> <li>• Listen effectively, sensitively question, analyse and check understanding</li> <li>• Adapt communication style to fit audience</li> <li>• Respond using plain English and the appropriate tone and media</li> <li>• Provide constructive feedback on performance</li> <li>• Encourage and help individuals to develop</li> <li>• Actively and professionally represent the Unit</li> <li>• Embrace communication feedback</li> </ul>
Initiative/Results Driven	<p>Able to:</p> <ul style="list-style-type: none"> <li>• Consistently meet Key Performance Indicators.</li> <li>• Own cases/tasks through to a successful conclusion</li> <li>• Work independently, tackling and solving problems and situations as they arise</li> <li>• Take on additional responsibilities as and when required</li> <li>• Contribute to projects</li> </ul>
Team Work	<p>Able to:</p> <ul style="list-style-type: none"> <li>• Coach and mentor colleagues</li> <li>• Share best practice and ideas</li> <li>• Build and maintain good working relationships</li> <li>• Seek additional responsibilities</li> <li>• Work reliably and flexibly to achieve team goals</li> <li>• Co-operate with team members to resolve problems</li> <li>• Acknowledge and appreciate others skill, experience, knowledge, creativity and contribution</li> </ul>