Job Description	
Job Title: **Reports to:** **Location:**	**EA & Data Analyst** **Managing Director, Client Solutions** **30 St Mary Axe**
Purpose of the role:	The role requires you to work with stakeholders from all business units and related third parties to undertake initiatives, led by the Head of Client Solutions, which have the ultimate aim of increasing the profitability of RFIB. You will engage in the delivery of a wide range of projects which may differ in scope and size and may impact RFIB processes, structures and systems. The role involves close liaison with members of staff working in all parts of the business, ensuring initiatives meet business demands and stakeholder expectations. In addition, you may be expected to provide secretarial and business / marketing support as may be required, primarily to the Managing Director, but also to other members of the senior executive and non-executive team as required. • Your role will interface with other CS members involved in CRM databases and client management as well as marketing and communications. • Establish and maintain knowledge databases. • Where required, assist the Project Assignee with the documentation of the solution, including detailed tasks to ensure the initiative is successful. Ensure the solution is efficient and utilises in house resources where possible. Ensure efficient use of third parties where required. Set timetable and deadlines. • Where required, work on initiative tasks as a member of the project team. • Assess IT systems on behalf of the business in conjunction with IT to ensure best fit for the business • Ensure that the overarching aim of the Client Solutions Team i.e the increase RFIB profits is being achieved at all times **Skills and Knowledge** • Clarity of communication at all times, both written and in discussions • Development of excellent relationships with all business stakeholders • Managing effective and constructive working relationships. • Organising and managing workflow. • Keeping accurate and up-to-date records. • Use of IT systems. • Clear written and verbal communication. • Taking initiative to build client relationships and to deliver innovative solutions where required.
Key accountabilities:	**1. Diary Management** 1.1. Arranging meetings and other appointments 1.2. Prioritising meetings, appointments and visitors. 1.3. Making travel arrangements 1.4. Preparation for meetings and presentations

	2. Organising Meetings as required 2.1. Liaising with attendees for dates 2.2. Circulating agendas and papers. 2.3. Attending meetings 2.4. Taking/circulating minutes and action points **3. Administrative Management** 3.1. Travel itineraries 3.2. Process expense claims 3.3. Produce ad hoc reports 3.4. Typing various letters, reports, documents, spreadsheets and presentations. 3.5. Power point creation 3.6. Knowledge of salesforce or similar CRM systems an advantage **4. Travel Coordinator** 4.1. Corporate travel – main contact for corporate travel supplier and liaison with travel administrators across the business and finance department on a regular basis to ensure good ongoing communication between our travel providers and the business **5. Marketing** 5.1. Providing ad-hoc Marketing support 5.2. Assist with the collation of information for promotional literature for CRM follow-up **6. Communication** 6.1. Communicate with clients and team members to answer queries and deal with any issues as they arise 6.2. Liaise with other departments as required. 6.3. Preparing for meetings, presentations and other appointments 6.4. Company Secretarial support on an ad-hoc basis **7. Develop self** 7.1. Contribute to Professional Development Plan (PDP) and identify training needs. 7.2. Undertake appropriate learning and Continuous Professional Development (CPD) as required for current/future job roles. 7.3. Maintain awareness of current market practice and initiatives 7.4. Develop knowledge and awareness of Risk, Compliance, Audit and Finance matters in order to improve support given
Development Areas	Discuss business problems with stakeholders, identify specific issues and impact on profitability of the business. The key areas you will be engaged with are country, client and geographical growth plans, carrier management strategy and preparation of data for key communications. Work with Client Solutions team to identify solutions to address problems. This may involve the use of process maps (Viseo) and MI solutions (Power BI) as well as other business information tools. Where necessary, liaise with the PM to construct the project plan and liaise with other BA s where expert technical solutions are required and/ or UAT is required before completion. Maintain the Project Listing dashboard and ensure this is updated for each operational board meeting. Ensure communication lines with all project assignees is maintained, particularly with regards to the status (RAG) of each project Broadening industry knowledge and being aware of industry initiatives

	IT systems, e.g. Microsoft Office and specific industry systems such as Brokasure General knowledge of insurance/broker/reinsurance markets and the processes of a London Insurance Broker.

Agreed by (Employee) ……………………………………………….	Agreed by (Line Manager) ……………………………………………
Signed ………………………………………….	Signed………………………………………
Date……………………………………………..	Date…………………………………………

- **The duties and responsibilities above are not a definitive list and additional responsibilities may be included within your current role. The job holder is also expected to accept any reasonable alterations and/or additional duties that may from time to time be necessary.**