

SKILLS FRAMEWORK FOR FINANCIAL SERVICES SKILLS MAP - PLACEMENT EXECUTIVE				
<b>Sector</b>	Financial Services			
<b>Track</b>	Sales, After Sales, Distribution and Relationship Management			
<b>Occupation</b>	Placement Executive			
<b>Job Role</b>	Placement Executive			
<b>Job Role Description</b>	The Placement Executive is responsible for the day-to-day execution of placements and compliance with administrative requirements. He/She ensures the seamless delivery of services to customers and that all customer documentation is properly handled and followed up with. He also works closely with internal teams to provide cohesive customer service.			
	The Placement Executive possesses strong problem-solving skills, and is able to analyse customers' business needs, and identify opportunities to develop business. He also possesses strong communication and interpersonal skills to work closely with customer servicing teams in providing advice.			
<b>Critical Work Functions and Key Tasks / Performance Expectations</b>	<b>Critical Work Functions</b>	Develop placement strategy	<b>Key Tasks</b>	
			Execute placement strategies to achieve growth goals and provide exceptional customer service	
			Assist with collecting and comparing quotes from insurance carriers	
			Review existing customer insurance and risk programmes to ensure accuracy of documents	
			Apply a basic technical understanding of the placement business to facilitate a seamless placement process	
	Record all activities in workflow system to ensure timely follow up by customer, carriers and client team			
	Manage placement of new and existing business	Complete administration in compliance with organisational procedures		
		Update data for clients with annual renewals		
		Review placement contracts and terms to ensure accuracy		
		Maintain accurate placement system entries to ensure contract execution as required		
		Review policies, submit invoicing to billers and issue Certificates of Insurance		
	Build and maintain relationships with key stakeholders	Support in handling market contacts needed to execute assigned tasks effectively		
		Interface closely with internal customer teams at appropriate levels to support customer retention		
		Inform customer servicing teams of major developments and risks affecting various types of coverage		
	<b>Skills and Competencies</b>	<b>Technical Skills and Competencies</b>		<b>Generic Skills and Competencies (Top 5)</b>
Business Needs Analysis		Level 3	Communication	Intermediate
Business Opportunities Development		Level 3	Interpersonal Skills	Intermediate
Business Performance Management		Level 3	Problem Solving	Basic
Customer Experience Management		Level 3	Service Orientation	Basic
Ethical Culture		Level 3	Teamwork	Basic
Market Profiling		Level 3		
Market Risk Management		Level 3		
Product Advisory		Level 3		
Stakeholder Management		Level 3		
<b>Programme Listing</b>	For a list of Training Programmes available for the Financial Services sector, please visit: <a href="http://www.skillsfuture.sg/skills-framework/financial-services">www.skillsfuture.sg/skills-framework/financial-services</a>			

The information contained in this document serves as a guide.