

Specification of Competency Standards of the Insurance Industry

Unit of Competency

Functional Area: Policy Service

| | |
|---------------------|--|
| Title | Make courtesy calls to customers to confirm the receipt of policies |
| Code | 105485L3 |
| Range | This unit of competency is applicable to those who are responsible for making courtesy calls to customers to ensure the receipt of policies. It involves comprehending corporate policy service guidelines and contacting customers to confirm the receipt of their policies. |
| Level | 3 |
| Credit | 3 (for reference only) |
| Competency | <p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Possess knowledge in insurance arrangement <ul style="list-style-type: none"> • Familiar with insurance market • Comprehend company's product terms and features • Possess good communication skills, e.g. phone manners • Comprehend company policy service guidelines 2(a). Comprehend company policy service guidelines <ul style="list-style-type: none"> • Comprehend company guidelines on how to make contact with customers • Comprehend company guidelines regarding handling objections 2(b). Contact customers to confirm the receipt of policies <ul style="list-style-type: none"> • Call customers, according to the company guidelines, to confirm the receipt of policies • Record whether customers have receiving the policies • Follow up with relevant personnel and units if customers have not received the policies • Re-send policies as necessary • Inform the customers, if necessary, if follow-up actions are taken. 3. Ensure customers receive their policies <ul style="list-style-type: none"> • Confirm with customers their receipt of the correct policies through courtesy calls in accordance with company guidelines • Perform necessary follow-up actions in response should situation arise, including notifying relevant units, resending policies and communicating with customers. |
| Assessment Criteria | <p>The integrated outcome requirements of this unit of competency are:</p> <ul style="list-style-type: none"> • Able to comprehend company's guidelines on policy service and contacting procedures • Able to make courtesy calls to verify the receipt of policies • Able to respond to situations with appropriate follow-up actions to ensure the receipt of policies. |
| Remark | This unit of competency is also applicable to general insurers and life insurers. |