

Job Description CRT Manager

Job Summary:

As a Customer Retention and Renewal Manager (CRT), you will be responsible for maintaining and enhancing relationships with existing customers, ensuring their satisfaction, and driving the renewal of products or services. Your primary goal is to retain and expand the customer base while delivering a high level of service and support.

Key Responsibilities:

- Looking after the issuance and quality of business across partners and maximizing issuance percentage.
- Real-time check on the tagged business to ensure that quality business is getting logged-in.
- Regular follow-up with insurance partners.
- Managing the team and ensuring customer satisfaction and proper claim assistance.
- Taking care of feedback and verification processes and make sure that complaints and support teams are efficiently utilised.
- Ensuring the adherence of IRDA Compliance across the operations and sales teams. Ensuring that renewal executives are adhering to their KRAs
- Assigning all the payments to the executives.
- Doing Lead Audits.
- Handling escalation calls and emails.
- Handling Life Revival Process.
- Maintain two-way communication with stakeholders, including operations team, insurance Companies and customers.

Research & Technological Initiatives

- Responsible to improve the efficiency of the process by paying attention on below factors:
- Competition Benchmarking.
- Finding process gaps and improvement areas.
- Adding valuable inputs and taking initiatives.
- Technical Developments for overall improvement of the process.

- Maintain a monthly report mentioning the initiatives taken with respect to the above pointers.
- Responsible for maintaining the following reports on a daily basis: Dialling Report, Daily Renewals Report, Live Payment Report, and Performance Report.
- Responsible for maintaining the following reports on a weekly basis: Company Wise Report
- Responsible for maintaining the following reports on a monthly basis: Monthly Closure Report, Expected Closure Report, Upsale Report, Other Adhoc Reports.

Required Skills:

- Proven experience in customer relationship management and customer support or people with claims handling experience.
- Excellent communication and interpersonal skills.
- Strong knowledge in Health & Life Insurance.
- Strong negotiation and problem-solving abilities.
- Proficiency in customer relationship management (CRM) software.
- Data analysis skills and the ability to derive insights from customer data.
- Results-driven with a focus on customer satisfaction and retention.
- Strong organisational and time management skills.