

Job Specification



Sales Agent

Reporting to: Head Of Department/Team Manager

Key Purpose

To work as part of the New Business Team in providing quotations, providing expert advice for our new customer base. Build and maintain your own pipeline in order to successfully meet the targets which have been set by the Operation. Must be able to demonstrate a high level of customer service and adhere to Company and trade regulations at all times. Develop good working relationships between departments and your peers.

Responsibilities

- Achieve individual objectives and key performance indicators as set and agreed
- Attend daily Buzz Meetings starting at 8.50am with your team
- Undertaking telephone-based quotes with prospective clients using fact find to capture data
- Researching the market and providing quotes and information to clients relevant to the protection they require
- Follow up calls to clients to chase decisions, progress of quote etc.
- Overcoming objections and promoting the key selling features of the recommended insurer
- Applying for cover on the insurers site and follow up progress
- Liaising with underwriters to gain an idea if cover will be covered and on what terms to advise client
- Ensure all policy administration is dealt with in a professional and timely manner
- Adhere to all Company, regulatory and compliance guideline requirements
- Maintain own technical competence
- Support colleagues from all areas of the business as required

Responsibilities Specific to Senior Adviser

- To assist in the maintenance, monitoring and drive of the core KPIs, processes and functions directly linked to team success.
- Coach & develop team members
- Handle a variety of complex work
- Handle policy referrals
- Be proactive & analytical in day to day role and when liaising with the management team
- Involvement with projects assigned by line managers or senior management team

Skills & Behaviours

- Demonstrate our values of Fun, Supportive, Professional, working in Partnership and Ambitious
- Confident and capable of building rapport over the telephone to provide an excellent client experience
- Ability to work in a regulated, compliant and client focussed environment
- Organised, resourceful, deadline driven and supportive of the wider team
- Quality orientated with great attention to detail
- IT literate
- Excellent interpersonal skills with ability to communicate well verbally and in the written word, listening, relationship management and communication skills
- Good understanding of the Commercial Insurance market
- Commission / target driven with previous sales experience
- Ability to overcome objections
- Previous new business experience (not insurance specific as training will be given)
- Ability to work independently, using personal judgement whilst operating within specific guidelines when reviewing underwriting terms and premiums.
- Excellent time management and ability to prioritise workload

Qualifications

- Chartered Insurance Institute Certificate in Insurance