

Job Specification



Client Liaison Adviser (Affinity GI)

Reporting to: Commercial Development Manager

Key Purpose

To deliver annual lead generation targets through effective outbound calling techniques and diary management in support of the business strategy.

Responsibilities

- Achieve individual objectives and key performance indicators as set and agreed
- Be pro-active and maximise all business opportunities through alignment of process and effective understanding of client needs
- Respond proactively and effectively to all new leads from the website and any external advertisements
- Provide professional support and advice to clients ensuring high levels of service and client satisfaction
- Consistently maintain records on the lead management system maximising lead to conversion rates
- Improve lead quality through pipeline cleanse projects and targeted campaigns
- Ensure all work is handled in a professional and timely manner
- Adhere to all Company, regulatory and compliance guideline requirements
- Be professional & pro-active when representing the Company at external events such as conferences and client visits when required
- Maintain and develop 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 delivery of the core KPIs, processes and functions directly linked to team success
- Coach and develop team members
- Assist in quality assessment, monitoring and sign off of team members
- Handle a variety of complex work and referrals

- Be proactive & analytical in day to day role and when liaising with the management team
- Involvement with projects assigned by managers or senior management

Skills & Behaviours

- Demonstrate our values of Fun, Supportive, Professional, working in Partnership and Ambitious
- Confident and capable of building rapport with clients over the telephone and at exhibitions to provide an excellent client experience
- Tenacious and motivated towards meeting and exceeding sales targets
- Able to generate leads (visits, quotes & renewal dates) working effectively and in partnership with the wider team
- Organised, disciplined and measured in managing own workload and time
- Ability to communicate effectively with others whilst working closely and flexibly
- Ability to work in a regulated, compliant and client focused environment
- IT Literate

Qualifications

- Chartered Insurance Institute Certificate in Insurance