



<b>Position</b>	<b>New Business Sales Advisor</b>
<b>Reports to</b>	<b>New Business Manager</b>

### **The purpose of your position**

As the New Business (NB) Sales Advisor your role is primarily about managing client communications to provide a high quality of customer service, which increases the Company's reputation and boosts sales. You will strive to maximise the sales revenue generated by providing good customer service through clear and accurate information and upselling where appropriate.

### **The position requirements and responsibilities**

#### ***Sales Activities***

- Achieving and exceeding monthly new business targets
- Ensuring you are passing your calls audits consistently
- Ensuring that scripts are always used
- Ensuring accuracy in everything you do to keep your setting up error rate consistently below 5%
- Efficiently responding to enquiries from prospects, clients, brokers and underwriters received in any format (phone, email etc) in a courteous and helpful manner
- Obtaining accurate quotations using the quotations system, rating guides or by referring to insurers
- Completing the key task of "fact finding" to identify clients requirements and to provide a quotation to fulfill their needs
- Following our internal procedure for verbally accepted quotations, confirming cover and providing written confirmation with full details of cover, enclosing proposal(s) for completion and the "Terms of Business" document
- Responding to enquiries from clients, brokers and underwriters received by phone, letter, email or fax and ensuring that all information required by clients or underwriters is obtained and communicated
- Proactively upselling any additional covers or add-ons
- Ensuring that all information required by clients or underwriters is obtained and communicated effectively
- Actively promote our products and services by clearly expressing the value and benefits of BG Insurance's products and services
- Minimising the sale of unsuitable products by encouraging best practise, before during and after a sale

#### ***Customer Service***

- Consistently treating customers fairly by providing clear information ensuring they are appropriately informed before the point of sale



- Ensuring your advice is suitable and takes account of their circumstances by not using jargon and listening to your customer
- Effectively communicating quotations, advising the most appropriate in terms of price and cover to meet the applicant's needs
- Ensuring that all the insurance requirements are satisfied by discussing any additional covers
- Proactively making recommendations for improvements to our service following customer complaints
- Ensuring that any customer complaints are promptly and appropriately handed to your manager
- Proactively limit the number of complaints received
- Ensuring that customers fully understand the features, benefits, risks and costs of the products they buy
- Maintaining an acceptable level of product knowledge by keeping up-to-date with product developments
- Striving to consistently meet the unique needs of each customer by offering a transparent, efficient and professional service

#### ***Sales records and documentation***

- Ensuring that paper files and system records are created for new business and updated with all client details
- Accurately updating the computer system with events, produce documents/correspondence as required in a timely manner
- Carefully checking new business documentation received from insurers and pass to the administration department for processing
- Ensuring that paper files and system records are created for new business and updated with all client details
- Liaising with the accounts department to ensure that credit control rules are followed and that cash flow objectives are achieved
- Chasing and receiving payments by cheque, credit card and debit card for new business
- Accurately issuing invoices and policy documents and updating client records accordingly

#### **Core Competencies**

- A professional understanding of what makes first-class customer service
- Committed and driven to deliver against targets
- Results-orientated
- Committed to providing excellent sales and customer service
- Excellent telephone manner with strong written and oral communication abilities
- Focused and self motivated
- Always professional
- Enthusiastic team player
- Strong attention to detail skills and capable of efficiently multi-tasking



### **Additional Responsibilities**

- It is expected that all team members help out with general office activities.
- From time to time you may be required to carry out tasks that fall outside your positions remit.
- Within reason, you may be required to work outside of your standard contracted hours to meet the needs to the business.
- As part of your ongoing development, you will be required to undertake training in order to meet the requirements of your role and the FCA.