



Position	Sales Support Administrator & Outbound Sales Advisor
Reports to	New Business Manager

The purpose of your position

As this a dual role you will be expected to provide support to the New Business Team by processing and sending out documents and setting up policies, as well as contacting clients who have submitted their details to obtain a quote and then passing these to the sales team.

The position requirements and responsibilities

Sales Support

- Providing support to the New Business team by processing and sending out documents and setting up policies
- Conducting relevant customer checks using the appropriate database
- Maintaining an error rate of below 5% aiming to achieve less than 2%
- Entering data accurately on to the exception computer and appropriately processing relevant documentation
- Accurately creating letters using the correct templates
- Ensuring policy documents are downloaded from SSP or Accubroker and saved in the relevant folders
- Issuing cover letters and ensuring they are sent within 5 days from acceptance of insurance
- Sending letters by recorded delivery when necessary
- Efficiently processing 'Buy Online' Policies
- Using 'Share My Licence' to gain personal data from customers and using this data to validate the customers driving licence details
- Efficiently setting up the new policy based on the paperwork generated on the system, completing financial accounts information accurately

New Business Sales Team Support

- Proactively taking overflow telephone calls for the New Business team when required and taking accurate and detailed messages to be passed on in a timely manner
- Proactively assisting the New Business team with adhoc tasks as required
- Entering data for the NB team when required on the relevant database

Other duties

- Answering and transferring calls to the relevant departments or take detailed messages passing them to the relevant person



- Ensuring that any messages given to the department are actioned by the time set or the end of the day
- Supporting other departments with their administration duties when needed
- General administrative duties including scanning and attaching documents

Outbound Sales Activities

- Receiving leads for non-standard business who have asked for a quote
- Providing potential clients with information and persuading them to get a quote from our sales team
- Passing successfully converted leads to the sales team in a prompt manner
- Continuously striving to convert as many leads as possible
- Being time conscious when receiving leads as we are competing with other brokers

Dual role management

- Managing your time effectively to be able to switch between two roles
- Being flexible and having team spirit to help out in both departments when required

Core Competencies

- Team player
- Strong attention to detail and accuracy
- Ability to enter data at a good speed and accurately
- Strong organisation and administration skills
- Polite and clear telephone manner
- Strong knowledge of Microsoft Word and Excel

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
- Your hours of work will be 9.00am to 6.00pm Monday to Friday and 1 in 3 Saturdays 9.00am to 3.00pm, calculated on a rotating basis.
- To assist in achieving team targets and deadlines.
- To assist in the positive implementation of change, growth and development within the business.