



Job Title: Insurance Sales Agent

Responsible To: Sales Manager

Main Purpose: To professionally convert outbound calls into a sale and sell our administration services to prospective LifeQuote (B2B service) users

Specific Responsibilities:

- Contact potential or existing customers in order to convert this into a sale on a non-advised basis.
- Understanding the customer's requirements.
- Process sales in a professional and accurate manner and pass on to the relevant department to be processed.
- Maintain accurate records of daily calls and sales and note defined information.
- Go the extra mile to meet the sales target.
- Contact, fact find and introduce LifeQuote to new Financial Advisers by phone with the aim of recruiting them to use LifeQuote's services.
- Arrange appointments, or follow up calls for the external sales team with the intention of securing new LifeQuote agents and generating new business income.
- Support specific sales campaigns, face to face, with selected advisers to promote specific LifeQuote messages or services.
- To conform to regulatory and cultural guidelines as set by management, including but not exhaustively: Treating Customers Fairly (TCF), Data Protection, GDPR, Health and Safety and EEC, Financial Crime, Money Laundering, Complaint Handling and Quality and Service Excellence.
- Identify improvements for customer and the business processes to deliver positive customer outcomes.
- Handle all customer contact, both verbal and written, in a professional and empathic manner, securing 'sales through service'.
- To provide the highest possible standard of Customer Care to meet customer needs and satisfy business demands.
- Show flexibility and carry out any reasonable duties set by the Sales Manager.

Competencies and Attributes:

Previous experience in the financial services is desirable, although not essential
Proven experience in a sales/customer service role
Excellent communication and interpersonal skills
Outstanding negotiating skills, with the ability to persuade and resolve issues
Ability to learn about the Company's products and services, and describe and explain them.
Cool tempered and able to handle rejection
Target driven
Self motivated
Enthusiastic
Ability to work on own initiative
Professional attitude
Confidence.

Qualifications/Education:

Educated to at least GCSE standard, grade A-C (or 9 -5) in English and Mathematics.

Experience:

Two to three years' experience in a tele-sales environment.