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| **Job description**  |
| **Role** | Lifesure Advisor |
| **Main purpose of the role** | To provide support to personal lines customers and ensure retention of renewal business, servicing of existing accounts in line with the set Key Performance Indicators provided by the company, and in accordance with company procedures and regulatory requirements. This is predominantly a customer service role that requires a sales approach to dealing with customers. There will be an element of outbound calling from various lead databases, as required by the company.  |
| **Location**  | St Neots |
| **Working hours** | 3 weeks in 5 0800 until 1600 Mon to Fri1 weeks in 5 1200 until 2000 Mon to Fri1 week in 4 1000 until 1800 Mon to FriSaturday shifts from 0800 until 1200 on a rota basis |
| **Department** | Motor |
| **Salary** | £19,000 |
| **Reports to** | Gary Armiger |
| **Direct Reports** | None |
| **Key Responsibilities and Deliverables** | Provide excellent customer service in all dealings with customers such as:* Ascertaining customer requirements and advising accordingly
* Disclosing clear and useful information about the product
* Ensuring all verbal disclosures are discussed with customer
* Handling telephone sales and producing alternative quotations
* Dealing with customers in office
* Issuing all necessary paperwork to customers
* Ensuring policies are adjusted in accordance with the customer’s requirements and policy terms
* Ensuring customer is aware of any changes in cover and premium
* Assisting with first notification and claims enquiries
* Reminding customers about outstanding documentation
* Outbound calling to various lead databases
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| **Other Responsibilities** | Follow all company procedures and regulatory requirements, with specific reference to data protection regulations. Assist in the growth of the business by cross selling other products as appropriate. General Administration.Other ad hoc duties as and when required by management. |
| **Behaviours** | Demonstrates the basic principles of teamwork |
| **Working Relationships** | This role will involve working in a team environment and will require the candidate to build and maintain strong working relationships with colleagues |
| **Major Challenges** | The successful candidate will be working in a busy office environment which involves working under pressure and to deadlines. Successful applicants will have a self starting mindset. |
| **Date of Preparation** |  |
| **Date Revised** |  |

**Person Specification**

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| **Criteria** | **Essential** | **Desirable** |
| Education and Qualifications |  | ‘A' level standard |
| Knowledge and Skills | 1 year insurance experience | 2 to 3 years insurance experience |
| Personality, Character Traits and Disposition | Keen to learn, willing to ask questions and to quickly absorb new information. Conscientious and motivated to meet targets and contribute to the team. An excellent teamplayer, personable and able to get on with colleagues in all teams. Able to work under pressure in a busy office. |  |
| Miscellaneous  | Proof of the right to work in the UK will be required. Money handling procedures require that a personal credit check is carried out for the successful candidate.  |  |