



Sales Specialist

Department:	Sales
Reports to:	Sales Team Leader - Beagle Street
Job Family:	Sales & Service
Career Family / Job Capsule:	Sales Specialist
Key dimensions:	Working as part of the Protection and Retention Team and reporting into Team Manager and Head Of Sales
Direct Reports	None

Purpose of the role:

- To make a notable contribution to the team sales conversion performance
- Delivering a consistent and market leading standard of service to our prospective and existing Life customers.
- The Life Consultant will be a role model within the team by consistently performing against target.
- Maintaining high service standards and always ensuring good customer outcomes from a compliance and regulatory perspective.

Key accountabilities:

- Effective questioning and Active Listening understand customer needs and use this information to ensure their requirements are met to deliver a market leading customer experience.
- Overcome objections confidently, effectively, and compliantly to support the customer through the sales journey, improving conversion whilst delivering great customer outcomes.
- Deliver exceptional customer service and take ownership of any past, current, or potential issues to support our first-time resolution ambitions.
- Consistent achievement of agreed Sales targets including sales conversion, upselling and retention whilst fulfilling regulatory expectations and service standards.
- Welcome customers arriving from various channels by offering them guidance and support through both our inbound and outbound offline sales journey.
- Be able to respond effectively to a variety of customer service queries by providing a great experience when interacting with potential and existing customers.
- Support and contribute to our customer retention goals through proactive and effective customer relationship management in all interactions.
- Adhere to all regulation e.g., the FCA's rules and principles, Data Protection Act & Money Laundering regulations.



Skills / Experience / Knowledge:

- Experience in delivering exceptional sales performance.
- Experience of delivering customer excellence in a fast-paced, multi-channel environment
- Able to demonstrate strong communication skills utilising these to deliver great outcomes.
- Self-motivated to deliver against performance targets whilst maintaining quality standards.
- Evidence self-awareness, emotional resilience, and ability to respond to customer needs through effective rapport building and appropriate use of empathy.
- Demonstrated experience in the insurance industry.

Values	<p>Our Values define who we are as an employee of Beagle Street, part of the OneFamily group. They come from the beliefs we hold, the way we behave and how we want to work together for our customers. For Beagle Street colleagues this means being:</p> <ul style="list-style-type: none"> • Principled • Courageous • Effective <p>Our values are unique to our brand. They give us purpose and focus. They are vital in helping us all 'do the right thing'. If we are confident that we are true to our values, then we can be sure that we are doing the best for our customers.</p>
Adaptability	<p>This job description is intended to provide a broad outline of the main responsibilities only. The post holder is required to be flexible in developing their role in agreement with their Line Manager. In addition, they may be required to carry out any other duties deemed appropriate within the role and expertise.</p>
Performance Management	<p>All employees have a responsibility to participate in regular one to ones with their manager and to identify performance standards of the post. As part of the performance management process every employee is responsible for participating in identifying their own training and development needs to meet the requirements of their role.</p>
Health and Safety	<p>Employees must be aware of the responsibilities placed on them under Health and Safety at Work Act 1974 and take reasonable care for the health and safety of themselves and of other people who may be affected by their acts or omissions at work.</p>
Equality and Diversity	<p>The Society is committed to building an environment where the diversity of its employees is valued, respected and seen as an asset to enabling delivery of the best possible service to our customers and colleagues. It is unlawful to discriminate directly or indirectly in recruitment or employment because of any of the nine 'protected characteristics' contained in the Equality Act 2010. These are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation. Failure to comply with organisational policies on equality and diversity may result in disciplinary action.</p>

**Confidentiality**

The unauthorised use or disclosure of customer or other personal information is regarded as gross misconduct and will be subject to disciplinary procedures and could result in a prosecution for an offence or action for civil damages under the General Data Protection Regulations. (GDPR).

Regulatory

- To comply, at all times, with all regulatory, statutory and legislative requirements so far as they relate to the role.
- To abide by the Rules of the Society at all times.
- To understand and comply with all Group Governance Policies, as appropriate to the role.
- To deliver all apportioned accountabilities and responsibilities

Individual Conduct Rules

Rule 1	You must act with integrity
Rule 2	You must act with due skill, care and diligence.
Rule 3	You must be open and cooperative with the FCA, the PRA and other regulators.
Rule 4	You must pay due regard to the interests of customers and treat them fairly.
Rule 5	You must observe proper standards of market conduct.
Rule 6	You must act to deliver good outcomes for retail customers

Declaration

I confirm I have read and understood the content of this Job Description and I accept the content as an accurate description of the role I am required to perform.

Job holders full name:

Job holders' signature:

Date:



Version Control:

Amendment Summary	Date	Reviewer
Updated to include new Rule 6 Conduct Rule.	01/02/2024	Louis Hopper