



Outbound Sales Consultant

Department:	Customer Operations
Reports to:	Outbound Sales Team Manager
Job Family:	Sales
Career Family / Job Capsule:	Professional/Core Colleague
Key dimensions:	
Direct Reports	None
Committee/Board membership(s)	
Approved Senior Manager Function(s), Prescribed or Other Overall Responsibilities and/or any Certification Function(s)	Please tick one of the following - Standard role <input checked="" type="checkbox"/>

Purpose of the role:

- Achieve best possible customer outcomes to deliver Sales and Income targets.
- To work closely with all stakeholders as the Champion of Outbound sales activity within OneFamily.
- Deliver against strategic objectives and quality measures.
- Optimise the current proposition and help develop our strategy to deliver the sales and Retention plans across agreed product lines to maximise income from existing customer through appropriate targeting for retention and cross sale opportunities.
- To provide accurate MI to internal and external Stakeholders to maximise all business opportunities.



- To be actively adaptable to new and existing business requirements driven through direct and intermediary sales channels including a variation of different tasks, campaigns and objectives.

Key accountabilities:

- Achieve Personal Sales and Income goals.
- Reporting, monitoring and analysing key information to maximise Sales Income. Understand competitor activity and the external environment to ascertain how to change and adapt, recommend options to improve and/or protect our position.
- Maintain quality measures within risk appetite.
- Maintain personal product knowledge at required standard demonstrated through agreed CPD.
- Maintain all customer records and Management information for your leads to agreed standards including campaign, sales, operational and financial performance against plans.
- Work with lead providers both internal and external to ensure all activities are maximised and within agreed budgets and timelines.
- Work effectively and collaboratively with all colleagues within OneFamily to ensure the consistent and timely delivery of a positive customer journey.
- Ensure that records are kept in line with the OneFamily Sales record keeping and file quality requirements.
- Adhere to both the principles and spirit of "Treating Customers Fairly".
- Carry out other related tasks and ad-hoc duties as required to ensure the smooth running of the organisation.

Skills / Experience / Knowledge:

- Proven track record in sales
- Good understanding of CRM systems.



- **Knowledge of Contact Centre workflow and telephony technologies**
- **Excellent Objection handling skills**
- **Results Focused - Continuously mindful of the effect of the actions taken and the implications effect of these and how they affect the desired outcome.**
- **Being Customer focused – You appreciate the impact of your individual actions and collective behaviours in relation to the effect upon the customer of the process,**

service or product provided. In doing so, you take appropriate action to ensure that the customer experience is positive (or where recognised as negative, takes steps to mitigate further dissatisfaction).

- **Able to use procedures and controls required to identify, mitigate and manage risks, complaints, breaches and to protect client assets and support business**

continuity plans

- **Industry Knowledge – Demonstrates sufficient awareness and understanding of industry trends and developments**
- **Excellent written and verbal communication skills**
- **The ability to prioritise, multitask and manage time efficiently.**
- **Team Working – You're known for contributing readily to ensure the success of the Team, and have the ability to work collaboratively with colleagues at all levels and from all business areas to support the delivery of your objectives**

Values

Define who we are as OneFamily. They come from the beliefs we hold, the way we behave and how we want to work together for our customers. For OneFamily this means:

- Principled
- Courageous
- Effective

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.



Adaptability	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.
Performance Management	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.
Health and Safety	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.
Equality and Diversity	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.
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	
	<ul style="list-style-type: none"> • 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.
Senior Conduct Rules: Applicable to Senior Management Function(s) roles only	
SC1	You must take reasonable steps to ensure that the business of the firm for which you are responsible is controlled effectively
SC2	You must take reasonable steps to ensure that the business of the <i>firm</i> for which you are responsible complies with the relevant requirements and standards of the regulatory system.
SC3	You must take reasonable steps to ensure that any delegation of your responsibilities is to an appropriate person and that you oversee the discharge of the delegated responsibility effectively.
SC4	You must disclose appropriately any information of which the <i>FCA</i> or <i>PRA</i> would reasonably expect notice.

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
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Updated to be aligned with the requirements under SMCR.	24 October 2019	Lawrence Quirk
Updated to accommodate solo regulated SMCR requirements	16 December 2019	Julie Cogger
Updated to include new Rule 6 Conduct Rule.	9 Feb 2023	Lawrence Quirk
Updated to amalgamate the standard, CF & SMF job description template and new values	3 April 2024	Heather Duckett