



Telemarketing Agent

Department:	Customer Operations
Reports to:	Outbound Sales team Manager
Job Family:	Direct Distribution
Career Family / Job Capsule:	Professional / Core Colleagues
Key dimensions:	(£Budget, Team headcount FTE, any other relevant P&L metrics as they become available)
Direct Reports	N/A
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:

As a Telemarketing Sales Agent at OneFamily, you'll be at the forefront of driving our mission. Your role is crucial in reaching out to potential customers over the phone, engaging them, building rapport, and effectively communicating the benefits of our innovative financial products and services. This is not just a job; it's an opportunity to make a difference while thriving in a fast-paced environment. This is a fantastic opportunity for individuals who thrive in a fast-paced environment, possess excellent communication skills, and have a passion for sales.

**Key accountabilities:**

- Conduct outbound calls to potential customers to introduce and promote our products and services
- Build and maintain strong, positive relationships with prospects to understand their needs and preferences
 - Clearly articulate the features and benefits of our offerings to effectively sell our products/services
 - Meet and exceed daily, weekly, and monthly sales targets
 - Document and update customer information in-line with company and regulatory standards
 - Collaborate within the sales team to share insights and strategies for improved performance
 - Maintain product knowledge to effectively position our offerings in the market
 - Provide exceptional customer service and address any inquiries or concerns from potential customers
 - Adhere to the principles of Consumer Duty and align to the OneFamily values

Skills / Experience / Knowledge:

- Excellent Communication Skills: Strong verbal communication skills are essential to engage with potential customers, understand their needs, and effectively communicate the benefits of products or services.
- Persuasion and Negotiation: Ability to persuade and negotiate with potential customers to achieve sales targets while maintaining a positive customer experience
 - Resilience: Telemarketing can involve handling rejection and objections. A resilient attitude is crucial to bounce back from challenges and persistently pursue sales opportunities
 - Active Listening: The ability to listen attentively to customers, understand their requirements, and tailor sales pitches accordingly
 - Time Management: Effective time management skills to handle a high volume of calls (thefficiently, prioritise tasks, and meet sales targets
 - Adaptability: The sales landscape can change quickly. Being adaptable and able to adjust strategies based on customer responses and market trends is important
 - Customer Focus: Putting the customer first, understanding their needs, and providing excellent customer service are key components of successful telemarketing
 - Teamwork: Collaborating with the sales team to share insights, strategies, and contribute to a positive team environment



Values	<p>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:</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	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

- 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
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