



## Job Description

<b>Job Role:</b>	Telesales Advisor (Healthcare)
<b>Reports to:</b>	Telesales Manager (Davena Barrow)
<b>Division:</b>	Jelf Employee Benefits
<b>Segment:</b>	Jelf Employee Benefits combined telephone consultancy team, Manchester

### Purpose of the job:

- To call B2B (business to business), research and identify business opportunities for Jelf Wellbeing Limited. This will involve working from a portfolio of accounts managing renewals and identifying additional opportunities for the Jelf Group.

### What we expect you to do:-

- To act as primary point of contact for the client, establishing effective relationships with clients. Building relationships that add value to all parties.
- To ensure the efficient production of all reports and correspondence to clients.
- To have a good technical knowledge of JEB products and services and consult with clients about their uses, features and benefits.
- To have a good technical knowledge of provider products and services, consulting with clients about the available proposition and helping clients to understand their requirements and match them to unique and appropriate proposals.
- You will need to be able to plan and manage a demanding workload, whilst remaining flexible enough to deal with sometimes demanding and challenging workloads.
- Take a pride in maintaining and auditing accurate and thorough records, including membership data, claims information and invoicing, paying particular attention to the need for cross referencing and checking details.
- You will need the ability and discipline to call clients and engage in conversations regarding products and services offered by the Jelf Group.
- Ensure that all business activity is logged on core systems so that revenue can be accurately recorded and monitored.
- Demonstrate an enthusiasm and interest and ability in gaining knowledge of additional Group products/propositions.
- Undertake duties as and when required by consultant to aid the greater needs of the business in terms of income generation and achievement of and exceeding business targets

### Qualifications

	Essential	Desirable
Professional - Essential qualifications required but must have a desire to study towards achievement of desirable CII elements.(Learning to be funded and supported by the Group)		CII IF7 CII GR1 RO4
Maths and English GCSE or equivalent	Grade C or above	Grade C or above
Driving Licence - Car		Yes

## How we expect you to behave

### Professional

Your actions are considered and thoughtful and you deliver on time.

### Effort

You approach tasks with energy and enthusiasm. You are proactive and positive in dealing with work matters and others. You take ownership for matters involving your allocated clients and endeavour to solve problems promptly and effectively.

### Team

You display flexibility and are adaptable when the need requires. You endeavour to personally develop your skills.

### Integrity

You keep promises and respect information and data with due discretion and confidentiality. You conduct yourself with a honesty and concern for others.

## Group competencies – skill areas and how you apply them

### Concern for Excellence

- Activates the highest standards of performance
- Faces every challenge with a “can do” attitude
- Committed to the achievement and maintenance of quality and accuracy
- Committed to exceeding client expectations
- Receptive to new ideas and positive change
- Keen to take on additional responsibility to develop own skills/knowledge
- Awareness of TCF initiative and compliance guidelines with a pro-active attitude to attaining both

### Planning, Organising and Delivering

- Demonstrates ability to prioritize own workload and to work on own initiative to identify issues, define problems and implement solutions
- Focuses energy and resources on tasks that add value to a) own role and b) their team
- Demonstrates attention to detail in dealing with all client matters and an ability to consistently record accurate information
- Demonstrates ability to comply with processes and procedures as directed
- Actively maintains compliant and accurate records
- Owns effective practical methods to manage workload and can (as a result) access resources and locate information efficiently
- Acts on requests within agreed timeframes

### Communication

- Communicates relevant information (both written and verbal) in a concise and effective way
- Meets deadlines and communicates information to others in a timely manner
- Produces accurate written communication to clients and shows ability to adapt format to client
- Readily contributes to the team meeting environment
- Establishes and effectively communicates a course of action to accomplish own goals and objectives (including the pro-active update of T&C file and review records)
- Establishes and effectively communicates a course of action to accomplish team goals (including the contribution of suggestions to benefit the team, coupled with a desire to take ownership and see suggestions through to delivery/conclusion)

### Personal impact and team effectiveness

- Interacts with others in an effective and sensitive way
- Uses correct channels to escalate issues and obtain information
- Respects and appreciates the needs of and works well with others and demonstrates an awareness of team objectives/aims

- Maintains effective work behaviour in the face of setbacks or pressure. Remains calm, stable and in control of themselves
- Is dependable, flexible and punctual and takes a positive attitude to challenges
- Responds positively to training and to suggestions/advice from peers and superiors
- Is positive and professional when working with colleagues and when introduced to clients/representing the Group on business.
- Takes ownership and responsibility for the outcome of all work undertaken
- Proactively participates in internal meetings

### **Divisional competencies – skill areas and how to apply them**

#### **Client Service**

Client management	<ul style="list-style-type: none"> <li>• Ensures that client requests and needs are satisfied responsively</li> <li>• Looks for ways to improve service and build a rapport with clients</li> <li>• Keeps promises made to client, consultant/team</li> </ul>
Handling objections	<ul style="list-style-type: none"> <li>• Recognises dissatisfaction and deals with this swiftly by referring to Line Manager</li> </ul>
Telephone techniques	<ul style="list-style-type: none"> <li>• Demonstrates a confident, professional and polite telephone manner.</li> <li>• An ability to establish details with clients through questioning and to communicate messages clearly</li> </ul>
Letter and report writing	<ul style="list-style-type: none"> <li>• Is conversant with all letters and templates in use by the team/on the system</li> <li>• Can write a non standard letter</li> </ul>

#### **Sales**

Jelf Group proposition	<ul style="list-style-type: none"> <li>• Has full understanding of the Group wide range of services/products</li> </ul>
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#### **IT skills**

Acturis and First	<ul style="list-style-type: none"> <li>• Excellent practical knowledge of all aspects of the processes for managing clients and records</li> <li>• Understand the data quality requirements for the Group</li> <li>• Know where to find and how to interpret data relevant to the role</li> </ul>
Outlook	<ul style="list-style-type: none"> <li>• Intermediate user</li> </ul>
Word	<ul style="list-style-type: none"> <li>• Intermediate user</li> </ul>
Excel	<ul style="list-style-type: none"> <li>• Intermediate user</li> </ul>
PowerPoint	<ul style="list-style-type: none"> <li>• Basic/Beginner</li> </ul>
Internet	<ul style="list-style-type: none"> <li>• Intermediate user</li> </ul>
Goldmine (if relevant)	<ul style="list-style-type: none"> <li>• As defined by the Group</li> </ul>

#### **Technical competency**

Administrative procedures	To have sufficient technical knowledge to complete your role to the required standards.
Products	
Compliance	
Claims	
Market knowledge	

Expected key performance indicators – measures of effectiveness	
Business measures (Weighting 70%)	Team business objectives e.g. income, retention, SLA's Quality of files – SQA results Data quality results Contract certainty results Volume of account queries/corrections/rework Aged debt against target Renewable Income Targets Growth Targets New business income
Individual measures (Weighting 30%)	Client Testimonials Client Referrals Cross Selling opportunities / Lead Generation
Personal authority	
Expenses	None – refer to line manager
Complaints and redress	No authority
Signing	No authority to sign any legal, agency or supplier contracts
Commission income	No authority
Fee income	No authority to set fee levels
Administration charges	No authority to waive or change charges as set out by the division
Writing off debts	No authority