



Lloyd Latchford

GROUP LTD

JOB DESCRIPTION

Job Title: Sales Advisor
Reports To: Sales Manager
Date: 18/01/2021
Salary band: £18,000 to £22,000

Purpose:

To assist in the operation of their department to ensure the smooth running of the department and providing an effective service to clients in order to achieve department and company objectives, working for high profile motor manufacture branded insurance divisions.

The key objectives of the role are to convert and administer new personal client enquiries, to assist achievement of budgeted income and to provide an appropriate level of service to

The extent to which the individual will be allowed to advise clients and the mix between client facing activity and administration tasks will be determined by their experience and the level of competence that they have demonstrated.

Nature and Scope

The jobholder's role will predominantly involve handling customer requests and enquiries in relation to the following areas of the business:

New Business

The role is office based and enquiries are received through visits to the office, internet enquiries and phone calls. These may include all types of personal lines insurance, including Motor, Home and Travel.

The jobholder will establish the needs of the customer by asking relevant questions and recommending a policy based on the customer requirements and knowledge of the industry.

A computer system is used to provide quotations. Details of quotations and client records are retained on the computer system. The jobholder will update customer records as necessary.

The jobholder is responsible for ensuring all information recorded is accurate, to provide policy documentation to the policyholder and obtaining any required information for transmission to Insurers or for scanning.

Diaries

The jobholder is expected to maintain and keep their diaries up to date advising their supervisor if they fall behind.