

**Hargreaves Lansdown, Role Profile and Person Specification**

**Role Profile**

<b>Job Title: New Business Executive</b>	<b>Hours of Work: Mon- Fri, 9am – 5.30pm. 37.5 hours per week</b>
<b>Salary: £20-25k Dependent on experience. Plus a fixed amount per appointment.</b>	<b>Reporting To: Franca Licata</b>

**Summary:**

Responsible for researching prospects and securing new business appointments for our New Business Corporate Consultants over the phone and via email.

**Key Duties & Responsibilities**

- Researching and identifying companies that are likely to provide profitable business to HLCS and finding the correct contact within the company to speak to concerning employee benefits,
- Recording appointment and scheme information accurately. Maintaining this information using HL's existing database to identify a suitable list of prospective clients to market to.
- Contacting prospective clients via the telephone, letter or email to arrange visits or networking meetings for our Corporate Consultants to attend.
- Managing relationships with prospective clients with suitable follow-up material.
- Ensuring all calling activity is done to the agreed criteria and does not include advice.
- Manage postponement and cancellations of meetings by communicating to all involved, rearranging and ensuring the meeting is rebooked.
- Provide assistance and support to consultants to help their relations with businesses employer from point of first meeting to winning the scheme where requested by arranging follow-up appointments.

**Person Specification:**

	<b>Essential</b>	<b>Desirable</b>
<b>Qualifications</b>	- A Level (or equivalent)	- Any financial services or pensions related qualifications. - Degree (or equivalent experience)
<b>Knowledge</b>	- Basic general knowledge of employee benefits - Awareness of HL's Corporate Vantage service - Computer Literate	- Understanding of HL's Corporate Vantage service
<b>Skills / Experience</b>	- Excellent communication skills - Good listening and questioning skills - Outstanding spoken English with the ability to improvise and handle objections quickly. - Excellent organisational skills to manage database administration - Good attention to detail - Experience of working on phones and dealing with clients.	- Experience of working within a sales / targeted environment - Experience of working within financial services / employee benefits
<b>Attributes</b>	- Hardworking and confident - Thick-skinned - Entrepreneurial - Good telephone manner - Able to work persistently and tenaciously making a high volume of calls each day. - Highly professional and a strong empathy with clients. - Pro-active and self-motivated	- Initiative to work unsupervised - Driven, creative and innovative - Desire to learn and willingness to keep abreast of the benefits industry - Able to work as part of a team whilst meeting individual and team targets