

## Hargreaves Lansdown, Role Profile and Person Specification

### Role Profile

<b>Job Title: New Business Consultant</b>	<b>Hours of Work: Mon- Fri, 37.5 hours per week</b>
<b>Salary: Up to £60,000</b>	<b>Reporting To: Head of Corporate Sales</b>

#### Summary:

Corporate Solutions are looking for exceptional individuals to join our new business consultant team.

Year on year Corporate Solutions is increasing its size and presence in the corporate pension marketplace. We currently look after more than 550 corporate clients, including over a third of the FTSE100. Assets under administration for Corporate Vantage have recently passed over £1 billion. With the advent of the "Pension Freedom" announcements our proposition and service is best placed in the market to deliver a unique workplace pension solution for all businesses and industries.

The role of the New Business Corporate Consultant will be focused around securing new business for Corporate Solutions with a primary focus around pension business, but the ability to sell flexible benefits is also important.

The right individual for the role will be a natural "people person", have exceptional presentation/communication skills, be tenacious when an opportunity is identified and proactive when working with the client towards a solution.

#### Key Duties & Responsibilities

- Responsible for securing new corporate clients and writing an agreed level of new business in the year.
- To carry out face to face meetings with new prospective clients; and presenting to Trustees/Senior Management with potential solutions to their pension, investment and flexible benefit requirements.
- Once a new client has agreed to work with us, working with the project team to ensure that clients are handed over effectively, managed appropriately and that business is retained effectively. Ensure the "post-sale" process is as efficient as possible.
- If relevant, manage ongoing relationships and provide advice to employers on their pension and investment options. Dealing with small to very large corporate clients from a diverse range of industries.
- Involvement in seminars and presentations to encourage prospective clients to engage with us.
- To operate at all times in a highly professional and ethical manner, reflecting the ethos of HLCS, and the spirit of "Treating Clients Fairly".
- Maintain up to date knowledge of developments within HLCS and in the Corporate Marketplace to help improve the proposition, as well as on-going professional development.

### Person Specification:

	Essential	Desirable
<b>Qualifications</b>	<ul style="list-style-type: none"><li>- A financial services or pensions related qualification</li><li>- Degree (or equivalent experience)</li></ul>	<ul style="list-style-type: none"><li>- Diploma level in a relevant financial services qualification</li></ul>
<b>Knowledge</b>	<ul style="list-style-type: none"><li>- Good general knowledge of employee benefits to include: pension accumulation/decumulation strategies and flexible benefits with sales experience in these areas</li><li>- Awareness of HL's Corporate Vantage service</li></ul>	<ul style="list-style-type: none"><li>- In depth knowledge of employee benefits to include: pension accumulation/decumulation strategies and flexible benefits with sales experience in these areas</li><li>- Knowledge of working with organisations to implement complex employee benefit arrangements</li></ul>
<b>Skills / Experience</b>	<ul style="list-style-type: none"><li>- Excellent communication skills</li><li>- Excellent problem identification skills</li><li>- Excellent listening and questioning skills</li><li>- Outstanding spoken English and presentation skills</li><li>- A high level of attention to detail</li><li>- Well-honed sales skills with a track record of sales over the last 2 years</li></ul>	<ul style="list-style-type: none"><li>- Exceptional sales skills with a track record of sales over the last 5 years</li></ul>

	<ul style="list-style-type: none"> <li>- The ability to work as part of a team, but also extremely capable working alone</li> </ul>	
<b>Attributes</b>	<ul style="list-style-type: none"> <li>- Hardworking and confident</li> <li>- Thick-skinned</li> <li>- A natural “people person”</li> <li>- Excellent presentation and communication skills</li> <li>- Able to work persistently and tenaciously</li> <li>- Highly professional and a strong empathy with clients</li> <li>- Pro-active and self-motivated</li> <li>- Driven, creative and innovative</li> <li>- Desire to learn and willingness to keep abreast of the benefits industry</li> <li>- Able to work as part of a team whilst meeting individual and team targets</li> </ul>	