

# Job Specification

**Job Title:** Professional Services Account Representative (Life Assurance)

**Reports to:** Senior Professional Services Manager

**Purpose of role:** Temporary role (4 months), potential to convert to full time position. Promote sales of Group Life products to existing members.

## Areas of Responsibility:

1. Own a database of c250 employers to contact regarding Life Insurance.
2. Support the build of employer communications highlighting the benefits of TPT's existing Life Assurance Product.
3. Where appropriate, support the Life Assurance renewal process.
4. Depending on the nature of the contacts:
  - Provide Client Relations/Professional Services Team with potential leads.
  - Contact the employers directly highlighting the benefits of TPT's Group Life product.
5. Arrange and attend client virtual meetings and phone calls.
6. Listen to employer contacts, demonstrating a genuine interest in understanding customer needs and providing exceptional service.
7. Create a weekly reporting schedule indicating progress.
8. Provide MI for internal board meetings.
9. Meet or exceed the contact and conversion targets.
10. To proactively contact employers to explain other Professional Services initiatives and the additional options available.
11. To perform all duties in line with TPT's Information Security policy.

12. To comply with the Data Protection Policy when dealing with personal data in the course of employment including personal data relating to any employee, customer, client, supplier, or agent of the Company.

13. To act as an ambassador of TPT at all times.

Performance & Engagement Factors	Essential	Desirable
Job & Technical Factors	<ul style="list-style-type: none"> <li>• Sales background – proven track record</li> <li>• Ability to influence customers</li> <li>• Knowledge or understanding of pensions and life assurance.</li> <li>• Effective communication skills</li> </ul>	<ul style="list-style-type: none"> <li>• Direct sales experience in a life assurance environment</li> <li>• Understanding of the life assurance renewal process</li> <li>• Understanding of life assurance principles</li> <li>• Knowledge of working with Defined Contribution (DC) and Defined Benefit (DB) pension schemes</li> </ul>
Engaged Behaviour	<ul style="list-style-type: none"> <li>• A desire to improve continually, and to work to the best of ones' ability.</li> <li>• Motivated for this role.</li> <li>• Embraces change at all levels.</li> </ul>	<ul style="list-style-type: none"> <li>• Enthusiastic to work with external bodies.</li> </ul>
Values	<p>Acts in line with our values:</p> <ul style="list-style-type: none"> <li>• Inclusive</li> <li>• Integrity</li> <li>• Innovative</li> <li>• Customer focused</li> <li>• Committed</li> </ul>	
Systems and Processes	<ul style="list-style-type: none"> <li>• Good IT skills – Outlook, MS Word, Excel etc</li> </ul>	<ul style="list-style-type: none"> <li>• Database knowledge</li> </ul>
Customer Care	<ul style="list-style-type: none"> <li>• Experience of working in customer focused environments.</li> <li>• Ability to communicate and influence</li> </ul>	<ul style="list-style-type: none"> <li>• Comfortable speaking to existing clients</li> </ul>
Performance Factors	<ul style="list-style-type: none"> <li>• Ability to work to deadlines.</li> <li>• Self-motivated to succeed.</li> </ul>	