



## JOB DESCRIPTION

<b>JOB TITLE</b>	SALES & DEVELOPMENT MANAGER							
<b>LOCATION</b>	SCOTLAND							
<b>DEPARTMENT</b>	PRIVATE CLIENT TEAM							
<b>REPORTS TO</b>	HEAD OF PRIVATE CLIENTS							
<b>REQUIRED START</b>	Q1 2018							
<b>STATUS</b>	<b>Fulltime</b>	<b>X</b>	<b>Part-Time</b>		<b>Fixed Term</b>		<b>Temp Agency</b>	
<b>OVERALL OBJECTIVES OF THE ROLE</b>								
<ul style="list-style-type: none"> <li>▪ To achieve agreed new business production targets</li> <li>▪ To have full responsibility for building and maintaining relationships with our introducer partners and Sales Management team within a designated regional area and to increase the company's insurance income from this source</li> <li>▪ To educate the introducers to provide the right introductions</li> <li>▪ To identify and respond to new business opportunities from other sources</li> <li>▪ To discuss insurance requirements with Private Clients and Corporate clients, seek suitable quotations and convert leads</li> </ul>								
<b>MAIN DUTIES &amp; RESPONSIBILITIES OF THE ROLE</b>								
<ul style="list-style-type: none"> <li>▪ To build strong relationships with and educate introducers to ensure a constant flow of quality referrals</li> <li>▪ To provide a timely, professional and efficient follow up on referrals to conversion and handover stage, ensuring all documentation is complete</li> <li>▪ To assimilate prospective private and corporate clients' insurance risks/needs and devise suitable solutions and obtain quotations wherever possible</li> <li>▪ To provide introducer with the management information they require</li> <li>▪ To provide management information to SPL Directors as required</li> <li>▪ To comply with relevant regulatory requirements, binding authorities and the company's procedures</li> <li>▪ To develop and maintain good working relationships with clients, colleagues, insurers and other suppliers</li> <li>▪ To undergo training in line with agreed objectives and keep up to date with technical, legal and market developments</li> <li>▪ To maintain and develop personal knowledge and skills through Continuing Professional Development (CPD)</li> <li>▪ Immediately to advise your Manager of any problems which may fall outside your authority, level of experience or which in any way detract from your ability to achieve your work objectives</li> <li>▪ To undertake any additional duties as may be reasonably requested by your Manager or the Directors</li> </ul>								

MAIN KNOWLEDGE / UNDERSTANDING REQUIRED FOR THE ROLE			
<ul style="list-style-type: none"> <li>Intermediate – household and motor insurance; the main classes of business insurance; the company’s procedures &amp; rules; FCA regulation and compliance (to the extent that they relate to the job); insurance market practice; principles of insurance; the main methods of controlling/reducing insurance risk</li> <li>Basic – other classes of private client insurance; other classes of business insurance; specific law (insurance and otherwise); claims handling; Health and Safety</li> </ul>			
IT KNOWLEDGE & LEVEL REQUIRED FOR THE ROLE			
APPLICATION	BEGINNER	INTERMEDIATE	ADVANCED
WORD		X	
EXCEL		X	
POWERPOINT		X	
OUTLOOK		X	
VISIO			
LEVELS OF AUTHORITY			
<ul style="list-style-type: none"> <li>New Business only</li> <li>All classes of personal lines and commercial insurances</li> <li>Quotes direct from insurers for non-binder business</li> </ul>			
ESSENTIAL / DESIRABLE SKILLS AND QUALIFICATIONS			
SKILL / QUALIFICATION		ESS	DESIRABLE
CII			
The ability to apply knowledge and understanding to the Job		X	
The ability to prioritise and organise own workload		X	
The ability to negotiate effectively with insurers and clients		X	
The ability to communicate effectively, both verbally and in writing		X	
The ability to write reports and make presentations		X	
The ability to sell		X	
The ability to work as a member of a team		X	
EQUAL OPPORTUNITIES			
<p>Stackhouse Poland are an equal opportunities employer and do not permit discrimination on the grounds of gender, sexual orientation, marital or civil partner status, pregnancy or maternity, gender reassignment, race, colour, nationality, ethnic or national origin, religion or belief, disability or age.</p>			