



JOB DESCRIPTION

Job Title **Sales and Service Consultant**
Reports to Team Leader

Aim of role

This role is responsible for phone based selling and servicing, following up and helping prospects by facilitating life insurance quotes and applications for them over the phone, answering questions they have, and guiding them through the process of obtaining insurance cover.

You will be responsible for managing and converting a pipeline of leads received through inbound calls, or by making outbound follow-up calls to prospects that have expressed an interest in life insurance. You will actively and assertively take, follow up and convert quotes to applications, while updating our CRM (system) tool to help drive a fast and efficient sales process.

Key activities

1. Answer inbound calls from NobleOak prospects and clients to provide product and other information with the aims of selling life insurance and providing great service.
2. Make outbound calls to NobleOak prospects and clients to offer products with the aims of selling life insurance and providing great service.
3. Identify client/prospect needs through appropriate questioning and listening techniques which comply with no-advice boundaries and ensure the client/prospect is well informed about the product.
4. Follow the prescribed call approach and structured framework when liaising with clients and prospects.
5. Respond immediately to client/prospect enquiries including quote and application requests.
6. Book in and take insurance quotes and applications over the phone (using prescribed NobleOak framework and procedures).
7. Accurately record discussions and interactions with clients and prospects in the Client Relationship Management System (CRMS) and through emails.
8. Ensure clients and prospects receive the correct information in a timely fashion by managing follow-ups and call-backs in an efficient manner.

9. Identify and accept where skills and knowledge gaps are apparent and work with leaders to increase your expertise through coaching, mentoring and training where necessary.
10. Address prospect, client, alliance partner and adviser queries over the phone.
11. Proactively and positively work with the team and other departments to achieve great client service and business outcomes, through effective relationship building.
12. Achieve KPIs and call quality requirements.
13. Identify areas for improvement or innovation and follow through on ideas to fruition.
14. Embrace and promote NobleOak's vision and growth initiatives.
15. Work in accordance with NobleOak's policies, processes and procedures.
16. Work in a fully compliant manner in line with internal guidelines and obligations and external regulatory requirements.
17. Perform other duties and special projects as required.

Work Health & Safety Responsibilities

Responsibilities	Performance Measure
Ensure all work undertaken in accordance with training and instruction	Conformance to procedures and safe systems of work
Report all hazards	Knowledge of reporting procedures
Use all equipment and PPE provided in accordance with training	Conformance to procedures and safe systems of work
Report all incidents	Knowledge of reporting procedures
Participate in workplace inspections	Completed workplace inspections.

Our Culture

An important aspect to this role is to help us drive a positive, engaging, high performance culture. Every NobleOak team member, including this role, will be appraised on the level of alignment they have with our values and required behaviours.

The four key elements of our culture are:



Nobility

Stand tall. We value integrity and always do the right thing by our clients and colleagues. We work in a respectful, positive environment that embraces diversity and shuns office politics.



Delivery

Own the outcome. We deliver results, not excuses. When we say we're going to do something, we do it. And we take responsibility for the outcome.



Simplicity

Play it straight. We don't bamboozle with jargon or hide behind small print. We use simple, clear language and offer 'no surprises' life insurance.



Adaptability

Challenge the status quo. We love pushing the boundaries and trying new things, even if success isn't guaranteed. We're continually learning and improving everything we do.

Our Vision

Our vision is to better protect Australians and their families, by providing more affordable and accessible Life insurance.

At NobleOak we only recruit people who believe in our vision of providing genuine value and great quality service to customers, to ensure they are better protected.

Skill requirements

- Very strong communicator - oral and written skills
- Experienced in sales/servicing, ideally in life insurance
- Positive and engaging
- Friendly and professional approach with clients
- Energetic and committed to client service