



# Outbound Sales Team Manager

Department:	Commercial
Reports to:	Cross sales Project lead
Job Family:	Customer Service and Sales
Career Family / Job Capsule:	Managerial /people manager
Key dimensions:	5 –10 FTE
Direct Reports	

**Purpose of the role:**

- To manage a team of up to 10 Advisors to maximise sales and revenue within agreed budgets.
- To Manage the 1<sup>st</sup> line supervision of a team of up to 10 Advisors
- Effectively manage the team's performance to ensure delivery against strategic objectives, quality measures and agreed sales plan targets.
- Optimise the current proposition and develop our strategy to deliver the sales and Retention plans across all product lines to maximise income from existing customer through appropriate targeting for retention and cross sale opportunities.
- To work closely with all stakeholders as the Champion of Outbound sales activity within Onefamily.
- To provide accurate MI to internal and external Stakeholders to maximise all business opportunities.

**Key accountabilities:**

- Be the lead contact for your team, managing all enquiries and ensuring that all requests/actions/issues are resolved within agreed timescales
- Work with lead providers both internal and external to ensure all activities are maximised and within agreed budgets and timelines.
- Report internal and external management information and use this information to recommend and implement process improvements where necessary that positively impact commercial value
- Achieve the Sales and Income goals for your team.
- You will develop, implement and refine a program of effective management information including campaign, sales, operational and financial performance against plans.
- Monitor all risk metrics to ensure they remain within risk appetite for the team.
- Reporting, monitoring and analysing key information to maximise Sales Income. Understand competitor activity and the external environment to ascertain how to change and adapt, recommend options to improve and/or protect our position.
- Ensure all Consultants have the training presentations and material required to maximise sales in a compliant manner, and ensure this is maintained through the appropriate level of relevant CPD.
- Work with the Project lead for Cross sales to develop the overall Strategy for the Channel
- Line manage up to 10 Advisors, ensuring colleagues are supported with existing and new product knowledge being maintained and developed
- Work effectively and collaboratively with all colleagues within OneFamily to ensure the consistent and timely delivery of a positive customer journey.



- Ensure that records are kept in line with the OneFamily Sales record keeping and file quality requirements.
- Adhere to both the principles and spirit of “Treating Customers Fairly”.
- Carry out other related tasks and ad-hoc duties as required to ensure the smooth running of the organisation

**Skills / Experience / Knowledge:**

- Proven track record in sales
- Good understanding of CRM systems.
- Knowledge of Contact Centre workflow and telephony technologies
- Able to use procedures and controls required to identify, mitigate and manage risks, complaints, breaches and to protect client assets and support business continuity plans
- Experience of using and setting standards for quality of customer service and working towards delivering it consistently
- Industry Knowledge – Demonstrates sufficient awareness and understanding of industry trends and developments. Is able to interpret the impact of competitor and regulatory actions on our business
- Excellent written and verbal communication skills
- The ability to prioritise, multitask and manage time efficiently.



- Being Customer focused – You appreciate the impact of your individual actions and collective behaviours in relation to the effect upon the customer of the process, service or product provided. In doing so, you take appropriate action to ensure that the customer experience is positive (or where recognised as negative, takes steps to mitigate further dissatisfaction).
- Team Working – You're known for contributing readily to ensure the success of the whole, even to the point of making personal sacrifice. You will position yourself as a senior member of the sales channel and be able to provide support and leadership where appropriate to others.
- Ability to work collaboratively with colleagues at all levels and from all business areas to support the delivery of strategic corporate projects
- Results Focused - Continuously mindful of the effect of the actions taken and the implications effect of these and how they affect the desired outcome.

Influencing – Having the ability to demonstrate to others the rationale and need for a course of particular thought or action. You will be able to influence not only the decisions of an individual customer but be able through your actions to influence your team to change its behaviours for the benefit of customers.

Values	<p>Define who we are as OneFamily. They come from the beliefs we hold, the way we behave and how we want to work together for our customers. For OneFamily this means:</p> <ul style="list-style-type: none"> <li>• Better together</li> <li>• Being your best</li> <li>• Being innovative</li> <li>• Champion the customer's needs</li> <li>• Doing what's right</li> </ul> <p>Our values are unique to our brand. They give us purpose and focus. They are vital in helping us all 'do the right thing'. If we are confident that we are true to our values, then we can be sure that we are doing the best for our customers.</p>
Adaptability	<p>This job description is intended to provide a broad outline of the main responsibilities only. The post holder is required to be flexible in developing their role in agreement with their Line Manager. In addition, they may be required to carry out any other duties deemed appropriate within the role and expertise.</p>



Performance Management	All employees have a responsibility to participate in regular one to ones with their manager and to identify performance standards of the post. As part of the performance management process every employee is responsible for participating in identifying their own training and development needs to meet the requirements of their role.
Health and Safety	Employees must be aware of the responsibilities placed on them under Health and Safety at Work Act 1974 and take reasonable care for the health and safety of themselves and of other people who may be affected by their acts or omissions at work.
Equality and Diversity	The Society is committed to building an environment where the diversity of its employees is valued, respected and seen as an asset to enabling delivery of the best possible service to our customers and colleagues. It is unlawful to discriminate directly or indirectly in recruitment or employment because of any of the nine 'protected characteristics' contained in the Equality Act 2010. These are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation. Failure to comply with organisational policies on equality and diversity may result in disciplinary action.
Confidentiality	The unauthorised use or disclosure of customer or other personal information is regarded as gross misconduct and will be subject to disciplinary procedures, and could result in a prosecution for an offence or action for civil damages under the General Data Protection Regulations. (GDPR).

Regulatory	
	<ul style="list-style-type: none"><li>• To comply, at all times, with all regulatory, statutory and legislative requirements so far as they relate to the role</li><li>• To abide by the Rules of the Society at all times</li><li>• To understand and comply with all Group Governance Policies, as appropriate to the role</li><li>• To deliver all apportioned accountabilities and responsibilities</li></ul>

Individual Conduct Rules	
Rule 1	You must act with integrity
Rule 2	You must act with due skill, care and diligence.
Rule 3	You must be open and cooperative with the FCA, the PRA and other regulators.



Rule 4	You must pay due regard to the interests of customers and treat them fairly.
Rule 5	You must observe proper standards of market conduct.

Declaration	
I confirm I have read and understood the content of this Job Description and I accept the content as an accurate description of the role I am required to perform.	
Job holders full name:	
Job holders signature:	
Date:	

### Version Control:

Amendment Summary	Date	Reviewer
Updated to be aligned with the requirements under SMCR.	24 October 2019	Lawrence Quirk
General Update	16 December 2019	Julie Cogger