

## Job Description

**Job Title:**           **Telephony Business Development Manager  
(Mortgage & Protection)**

**Reports to:**         **Senior Development Team Manager**

**Department:**      **SimplyBiz Mortgages**

**The role:**           To create, build and maintain relationships with members to maximise usage of SimplyBiz Mortgages, SimplyProtect and other ancillary services. To identify new business opportunities and pass effective leads through to relevant departments. To work effectively with members and provide market leading service at all times. Carry out robust fact finds to identify accurate solutions to complex enquiries. Proactively work with all members to add value to every call, identifying up and coming events, focus weeks, and alternative opportunities and benefits that the club and group can offer. Regularly identifying new leads for field team and efficiently handing them across. Proactively achieving outbound and inbound call targets. Ensuring a positive, approachable and helpful manner at all times to drive SimplyBiz as the preferred first choice with members in all business areas. Competently working with all technology provided to ensure beneficial outcome for members

### Key competencies for the role:

Competency title	Brief description
Communication skills	Internal and external communication skills need to be effective and flexible via telephone, written and face to face where required. These skills are essential in all interactions including internal colleagues, members and business partners. Understanding the most appropriate tone, pitch, pace and delivery style is essential.
Customer service	Both internal and external. Rapport building, listening and interpretation, fact finding, understanding needs and negotiation. Utilising data and knowledge to add additional value to members businesses where possible. Maintains positive internal relationships.
Time and self-management	Organisation and prioritisation, working to deadline, taking ownership and accountability for own area.
Helping others	Training and developing others. Coaching others. Mentoring.
Innovation & Creativity	Generating Ideas, creating, visionary.
Understanding of the organisation	Understanding of the group vision. Understanding the SimplyBiz group and all the business within it. Competitor and industry awareness.
IT Skills	CRM, word, excel and basic PowerPoint.
Running Effective Meetings	Assisting with organising meetings, running them to a fixed agenda and follow up after the meeting.
Problem Solving.	Research, investigation and decision making. Ensure thorough fact find to correctly identify challenge area, research alternative solutions to allow best possible outcome for all parties concerned. Professional and clear delivery of decision within

	realistic time period. Always asking for support and help where required.
Project Management	Ability to work with third parties to discuss and agree project scope, deliverables and timelines. Able to provide internal briefings on project requirements at all levels and then oversee the implementation and delivery of the project. Understand testing structures for the delivery of key go live requirements
Change Management	Recognise the need for change and the impacts of change to both the individual and the team. Be able to communicate the requirements for change and maintain ongoing communications on implementation and delivery. Be able to work with staff to understand their concerns and issues and recognise and implement relevant and appropriate support.

### Key responsibilities:

- Assisting members in the placement of mortgage, protection and general insurance business and assisting them in general day to day queries
- Proactive interaction with members in relation to bespoke lender/provider and SimplyBiz Mortgage campaigns
- Regularly undertaking outbound calling campaigns to promote events and initiatives
- Proactively build and develop relationships with a panel of member firms by adding value to their businesses
- Fact find new member firms to understand potential usage and potential business opportunities
- To help, where required, with the recruitment of potential new members and the retention of existing members
- To undertake specific projects from time to time
- Provide support to the other members of the team when needed.

### Person specification:

- Self-motivation and discipline
- Confident
- Organised and able to prioritise work load
- Enjoys leading by example
- Ability to positively influence others
- Customer focused
- Flexibility, ability to work within a changing market place

### Experience and qualifications:

- Full CeMap advantageous, a willingness to take & pass qualification (if not held) is essential.
- A full understanding of the mortgage market & lender criteria
- A full understanding of the protection and general insurance market
- Experience of the intermediary market place is desirable
- Experience of using mortgage and protection sourcing systems
- A working knowledge of the protection and general insurance market

- Experience of working closely with Senior Management Teams