



Sales Support Manager

Department:	Growth
Report to:	Head of Intermediary Sales
Job Family:	TBC
Career Family / Job Capsule:	TBC
Key dimensions:	(£Budget, Team headcount FTE, any other relevant P&L metrics as they become available)
Purpose of the role:	
<p>Evaluate and develop an operations framework to ensure internal and external sales functions work as one coordinated team to maximise new business opportunities across all product streams</p> <p>To progress operational processes as strategy evolves contributing to the strategic planning with senior managers</p> <p>To ensure the effective management, evaluation and analysis of sales information is used to maximise sales productivity</p> <p>Work closely with senior managers in the Intermediary sales function to ensure optimising relationships with key accounts and other channel distributors</p> <p>To identify and deliver improvements to Sales and servicing processes, driving efficiencies and reducing costs where possible</p> <p>To develop a comprehensive risk management framework for intermediary sales ensuring adherence to all regulation and identify potential future risk.</p>	



Key accountabilities:

- To act as the primary sales operation point of contact for both internal and external sales colleagues, ensuring that first class operational support is provided contributing to achievement of sales targets
- To be responsible for the management and leadership of the service and support function including the IFA Support team, MI and data management. Ensure the CRM system is effectively managed and maintained, acting as the SME with regards to best use of the system
- Implement and develop robust processes for sales operations, quality and risk management for each distribution channel ensuring that these are maintained, adapted and documented throughout the year
- Identify operational risks and establish effective, proportionate and appropriate controls to put in place to mitigate and keep risks within acceptable tolerance levels
- Lead on compliance and audit interface and ensure no overdue audit actions
- Interface with Enterprise Services for IT improvements e.g. CDB
- Influence and shape across the business, ensuring the strategic direction of the sales department is aligned to the strategic goals of the Growth business. This will include building close working relationships with key internal and external stakeholders and representing the sales channel on projects and initiatives
- Develop a suite of effective management information including sales, operational and activity monitoring against plans. This will lead to recommendations for change as appropriate and drive future development plans
- Analyse performance data and MI, identifying further opportunities to increase sales and/or improve our servicing capabilities. Continually seek ways in which the MI can be developed to meet the needs of the business

Skills / Experience / Knowledge:

- Extensive industry knowledge of the protection market
- Good knowledge of the LTM market
- Likely to demonstrate substantial experience in the life and pensions market in a sales and/or operational management role
- A credible ambassador, able to work at the most senior levels within the partnerships market
- Strategic thinking and decision making
- Strong leadership skills
- Extensive influencing and negotiating skills
- Effective communicator - both verbally and in writing
- Numerate and commercially focused
- IT literate - particularly the use of databases
- Team working
- Results focused
- Customer driven



- Monitor operational and sales activities to exceed external SLAs, build reputation of OneFamily and maximise performance of the distribution channels
- Ensure annual due diligence is carried out and recorded against each targeted intermediary account to protect the society's interests
- Continuously measure and seek opportunities to improve our people, processes and technology, improving efficiency year on year
- Effectively manage all Third-party relationships, seeking to improve service whilst reducing costs
- Deputise for the Head of Intermediary Sales as and when required

Values

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:

- Better together
- Being your best
- Being innovative
- Champion the customer's needs
- Doing what's right

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.



Adaptability	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.
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

- To comply, at all times, with all regulatory, statutory and legislative requirements so far as they relate to the role
- To abide by the Rules of the Society at all times
- To understand and comply with all Group Governance Policies, as appropriate to the role
- To delivery all apportioned and assigned accountabilities and responsibilities



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

Version Control:

Amendment Summary	Date	Reviewer
Rebranded	13/07/2018	Reesa Berry, Resourcing Partner