



## JOB DESCRIPTION

New Business Operative



# Mission Statement

At first union we are committed to offering our customers the highest possible standards of service. In so doing, we are pleased to continue to support the principle of 'Treating Customers Fairly', better known as TCF; and the initiatives being taken by the Financial conduct Authority to further its implementation.

To our customers we are committed to;

- Making customers our Number One priority
- Delivering exceptional customer service
- Treating each customers' needs on an indivial basis
- Offering financial packages that meet our customers circumstances
- Ensuring compliance of the highest standard with the regulatory authorities
- Continuous improvement and innovation in the way we do business

To our staff we are committed to

- Ensuring the welfare of our staff
- Working together to achieve goals
- Listening to staff and valuing feedback
- Creating a challenging, regarding and exciting working environment
- Developing team spirit
- Continuous improvement and innovation in the way we do business



**Job Title:** New Business Operative

**Remuneration:** £14,500

**Reporting to:** New Business Team Leader

### Role specification

- To utilise data to contact clients who may be interested in finance and who might find First Union services to be of interest
- Be responsible for ensuring excellent customer service by meeting and exceeding the customers' expectations
- Ensure that the Company's service standards are adhered to
- Working together, meet and exceed all team targets
- Ensure compliance with FCA procedures and guidelines
- Use a written script whilst also allowing flexibility to answer customer questions or to handle objections

### Person Specification

- You must be a top performer in your role and ensure you meet and exceed all targets given to you
- Ensure daily reminders and leads are worked correctly and promptly
- Assist the line manager in identifying training needs
- Demonstrate a responsible and professional attitude
- Ensure good timekeeping and attendance
- Other projects and duties commensurate with the post, as required
- Excellent customer service skills

