**Purpose:** To help Direct to Fund customers select the most appropriate level of Private Health Insurance by providing personally tailored solutions that deliver an outcome for the customer and generate sales for the Health Fund.

**Reports to:** Team Leader – Sales

**WHAT you do**

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| **Task** | **Weight** | **Details** | **Measures** |
| Sales | 50% | * Helps/Promotes/sells/secures referrals from existing and prospective customers through a relationship-based approach * Take a personal approach to selling and helping clients * Demonstrates products and services to existing/potential customers and assists them in selecting those best suited to their needs * Receives inbound & makes outbound telephone calls to existing and prospective customers * Develops clear and effective written quotations for current and prospective customers * Expedites the resolution of customer problems and complaints * Coordinates sales effort with relevant stakeholders such as the Office and Operations Managers * Identifies advantages and compares organization’s products/services * Plans and organizes personal sales strategy by maximizing the Return on Time Investment for marketing campaigns as directed * Follow up on quotations and provide after sales service * Assist external agent channel requests as required * Follow all policies, procedures and sales scripts as provided and directed from direct report and management * Assist in attending external marketing campaigns as directed | * Meets or exceeds sales targets * Product demonstrations are accurate and result in customer sales * Calls to customers and potential customers as per customer requirements * Proposals are accurate, timely and professional * Customer complaints are all resolved within company policy and to the satisfaction of the customer * Product knowledge is 100% up-to-date * Product knowledge is applied to customer needs * Call cycle maximizes efficiency and sales * Positive customer feedback * Sales Force is used to measure productivity and results |
| New Prospect Handling | 30% | * Proactively manage the lead pipeline to maximize the conversion of all prospects into opportunities * The effective handover of opportunities as directed to sales team members * Assist with the follow up of prospects from vertical marketing campaigns’ * Contact DFT leads as the highest priority within 1 hour of owning the lead in Sales Force * Contact Campaign leads as directed | * Achievement of Activity and productivity targets * Achievement of the monthly New Sales Team Target * Achievement of personal sales targets * Minimum benchmark of 2.8 SEU’s per working day |
| Sales Administration | 20% | * Ensure the Client database (Salesforce) is up to date and maintained daily. * Ensure that all prospects are handled efficiently & effectively and recorded appropriately * Regular market and product feedback from the prospect / client’s to be consolidated and reported to management * Ensure all sales are recorded in both HAMBS and Salesforce | * Accurate weekly & monthly reporting to the Team Leader/Sales Manager to agreed timeframes * Sales Force will be tool for measuring productivity * HAMBS will be the tool for tracking sales numbers |
| Sales Reporting | 20% | * Attendance at the daily sales & marketing briefing as directed * Attendance at monthly sales meeting to discuss sales activity, forecasts and monthly results * Accurately record your daily industry in Sales Force which is the measurement of your productivity * Supplies management with reports on customer needs, problems, interests, competitive activities, and potential for new products and services | * Reports are accurate * Pro-active Reports submitted weekly * Reports make suggestions and recommendations regarding improvements * Customer plans increase market growth by agreed sales target * 100% attendance at all monthly sales meetings * 100% attendance at 1-on-1 with Sales Management |

**HOW you do it**

|  |  |  |
| --- | --- | --- |
| **Values** | **Weight** | **Description** |
| Integrity | 20% | * Shows discipline and consistency to execute the role thoroughly * Is accountable for their actions, admits mistakes, learns from them and makes changes – doing what you say that you will do * Be reliable and accountable to your crew * Always behaves in a professional manner |
| Ambitious | 20% | * Go above and beyond for the customer, and seek ‘First Call Resolution’ * Is always open-minded and keen to learn new tasks and skills and follows the solution to completion * Is proactive – shows initiative to go above and beyond what is required to reach solutions |
| Confident | 10% | * Is decisive when making decisions * Paint a full Picture * Is optimistic and has belief in their ability and their actions in the role |
| Vibe, Attitude and Passion for health.com.au | 20% | * Has high energy and actively helps to create a great place to work * Displays enthusiasm towards their role, teammates and customers * Actively displays a positive approach to their role and tasks * Demonstrates desire to achieve health.com.au’s business objectives * Shows passion for the health.com.au brand and respects its customers |
| Team Focus  and  Innovation | 30% | * Acknowledges and accepts that others work and think differently * Respects others and considers the impact of their actions and behaviours * Values the input and know-how of other team members looks for opportunities to help others * Works with other team members toward a common goal, facilitating a team solution * Embraces a paperless environment * Has both an Inward and outward positive experience * Constructively questions the way things are done and suggests ways for continuous improvement * Knows the marketplace and keeps track of new technologies and trends that can improve quality and service * Embraces change * Actively seeks out and implements new ideas that support the business |

**Successful Candidate Profile**

* **Skills Required:**
  + Well established problem solving skills
  + Time management skills with the ability to multi-task
  + High level of attention to detail
  + Excellent computer skills and proficient in excel, word, outlook and access
  + Advanced communication skills
  + Excellent relationship management skills
  + Effective presentation skills
  + Accepts a high level of accountability is necessary to perform the role

* **Experience Required:**
  + Previous experience in an external sales role
  + Demonstrated ability to achieve and exceed sales targets
  + Australian residency/work permits
  + Has experience in substantially growing a sales territory or market segment
  + Sound knowledge of office management principles, modern office technology and computer software applications and their operation
  + Experience creating tenders and sales proposals
* **Competencies Required:**
  + Sense of urgency and a bias for action
  + Solutions focused
  + Innovative and receptive to change
  + Customer focused
  + Results driven
  + Negotiation and influencing skills