

## Job Description

**Job title:** Digital Acquisition Executive (Telemarketer) – Part Time

**Reporting to:** Digital Acquisition Director

**Date of issue:** January 2024

Ellis Bates is a Financial Times Top 100 firm of financial advisers, offering a wide range of financial services to help individuals and businesses achieve their financial goals.

Due to maternity leave, we are looking for a friendly, telephone-confident professional to join our small telemarketing team.

You will be an integral member of our marketing team who work side by side our financial advisers to provide a stream of new meeting opportunities and this qualification role is a vital link in this key business process.

Full training will be given on all aspects of the role which includes:

### Role Overview

Making outbound calls arranging appointments for our network of financial advisers, working closely with them to collect prospect data and managing their diaries effectively.

### Duties and Responsibilities

- Learn, train and become proficient at carrying out the current call script
- Call all incoming leads, in rotation, within an agreed timescale
- Make outbound calls in a friendly, empathetic, professional manner to leads, qualifying them by asking scripted questions and securing a booked appointment in the financial adviser's diary.
- Ensure all out of specification leads are rejected as per the terms of the lead provider agreement.
- Work your 'calling in progress' list and pipeline in accordance with current guidelines
- Accurately record all data and information on the CRM
- Remain within compliance and data protection guidelines at all times
- Build strong relationships with the network of financial advisers
- Work to agreed appointment conversion and business performance targets
- Proactively develop your financial knowledge

We provide ongoing telephone skills, financial compliance and product training.

#### **Other**

- Undertake all other duties as reasonably required and directed.
- Hybrid working
- 21 Hours per week and providing holiday cover for colleague

#### **Compliance**

- To comply with our internal Compliance and other procedures.
- To work within the regulatory requirements of the FCA at all times
- To ensure compliance with the General Data Protection Act, and any other guidance which forms part of the day to day role.

#### **Treating Customers Fairly**

- All employees are required to engage with the company's "Treating Customers Fairly" policy and will be appraised of their understanding of the culture on a regular basis

#### **Security**

- Report any potential breaches, including weaknesses in current systems to a Director.
- Ensure personal data (client and employee) is secure, held and properly utilised in accordance with the General Data Protection Act

**This Job Description may be reviewed and subsequently amended to better reflect any changes required in the role**