

# Role Profile- Onboarding Executive

**Purpose:** To collaborate with the Team Managers and wider team colleagues to onboard customers, optimise sales opportunities and retain existing members using established onboarding techniques. To represent Benenden Health in a professional and courteous manner with the customer's needs at the heart of all your decision making.

**The post holder will:**

Speak with customers, both new and old. As a valued member of our established team, handle both inbound and outbound calls as and when required. With the Members at the heart of everything we do. You will promote Benenden's services in line with our core values and use your interpersonal skills and training to retain members who may wish to cancel their membership.

Work with potential and lapsed members to understand the benefits of new/ongoing membership to secure member loyalty and new business growth.

Engage with members, colleagues, and managers to ensure Benenden remains first choice in specialist health care for our members, contribute to the business with creative ideas to ensure Benenden remains an aspirational employer and a great place to work.



**Key Result Areas**

- Achieve agreed targets for onboarding and retention.
- Arrange and conduct follow ups to potential and lapsed members, secure new business and re-engage ex-members.
- Treat customers in a fair and consistent manner. Ensure all telephone conversations are FCA compliant and the customer's needs are considered.
- Follow business process and procedures to deliver high class customer care.
- Suggest improvements that will benefit customers or the wider business.
- Performance ownership, to be able to track personal objectives and results, providing timely feedback and discuss any support recommendations with your Line Manager.
- Maintain a good knowledge of our Society services and continuously work to make improvements.
- Deliver 100% accuracy of all data input, ensuring the correct recruitment codes are allocated and the payment is in line with DD guidelines.

**Measurement**

- Against agreed objectives
- Audit, Risk and Regulatory Compliance.

**Skills and Experience**

- Effective communicator
- Customer driven
- A Team Player
- Solution focused
- Previous experience of working in Customer Service/Care is desirable
- To be able to multi-task
- Experience in sales is desirable

**Values**

- Be Caring**
  - We know what we do matters
  - We're proud and enjoy what we do
  - We promote a culture of care, respect, compassion and wellbeing
  - We protect the mutual ethos
- Be Connected**
  - We collaborate and share across teams, departments and the business
  - We listen to understand each other and our members' needs
  - We support one another by having open and honest conversations
  - We recognise that we're stronger together
- Be Brave**
  - We embrace change
  - We challenge and ask 'why' as well as 'why not'
  - We always want to learn
  - We are not afraid of trying new concepts and ideas
- Be Smart**
  - We approach problems with a solution mind-set
  - We actively seek to improve and be better and we learn from our mistakes
  - We spend members money wisely
  - We're invested in the future of our business