

JOB DESCRIPTION

Job Title: Enroller **Level:** 9SS

Purpose: To explain key facts in relation to Unum Select product choices to employees (no advice is given) and conduct group presentations and enrolment interviews with individual employees face to face at their place of work.

Reporting To: Enroller Manager

Department: Enrolment **Division:** Marketing & Business Development

Key Accountabilities:

- Conduct face to face enrolment sessions with employees according to agreed enrolment strategy and appropriate guidelines
- Execute group enrolment meetings and presentations, according to appropriate guidelines
- Attend/participate in enroller briefing session to confirm enrolment details and tailor behaviour to company culture as required
- Attend/participate in enroller debriefing session to report back on the enrolment event
- Support the requirement to carry out enrolment events as dictated by the business/employer (requires unsociable hours working patterns)
- To disclose information and distribute collateral as defined within the enrolment process
- Provides secondary forms to applicant as required, obtains signatures as required per form, such as "replacement forms", and sends secondary forms to Unum
- Responsible for ensuring applications are complete and submitted on timely basis
- Work with the employers HR department and undertake any activity to deploy HR solution
- Works with the enrolment co-ordinator, takes responsibility for day to day logistics at employer's place of work and escalates any issues arising from the enrolment event.
- Arrive at enrolment event on specified times/days as per agreed schedule with Unum
- Ensures approved, company specific communications are delivered to all employees
- Provides management information and quality check
- Record worked hours against Annualised Hours
- Supports the telephonic enrolment service (TES) where required by providing additional TES cover
- Promotes Unum internally and externally
- Understand how Treating Customers Fairly (TCF) and Risk Management relate to both your own role and your divisional activities and highlight any opportunities for improvement
- Accountable for ensuring Treating Customers Fairly (TCF) and TCF implications are considered and promoted in all company activities.

Behavioural Competencies:

- **Delivers Results**
Sets high goals for personal accomplishment; works diligently to meet/exceed goals
- **Develops Self**
Display strong capacity and thirst for learning and developing self; has keen self-awareness re: strengths and areas of development
- **Good Judgment.**
Evaluates options by considering implications and consequences; chooses an effective option
- **Strong Business Knowledge.**
Displays strong understanding of own department and good general understanding of overall business
- **Strong Teamwork**
Actively works collaboratively to help move the team toward the completion of goals
- **Values Driven.**
Interacts with others in a way that gives them confidence in one's intentions and those of the organisation.

Required Knowledge and Skills:

- Good knowledge of Unum Select products and services
- Detailed understanding of enrolment process
- Full understanding of the customer feedback process
- Excellent communication skills
- Systems knowledge (Unum Select, enrolment.com)
- Time management and excellent organisation skills
- Use of appropriate systems: POWERPOINT, WORD, EXCEL & OUTLOOK
- Ability to work and meet deadlines
- Attention to detail

Training Requirements:

- Corporate Induction course (3 months after starting run by HR Training)
- Unum Company information (Going Live)
- Compulsory Annual Training (CAT) covering:
 - Data protection
 - Risk management
 - Complaint handling
 - Money laundering
 - Compliance
 - Whistle blowing
 - Health & Safety
- Unum Select products and underwriting (Advice vs information training programme)
- Ongoing products & processes & systems training
- Enrolment System training (Simply Unum, enrolment.com)
- TES specific training

Minimum entry criteria:

- Good level of basic education with aptitude for numeracy and literacy
- Good interpersonal skills - ability to communicate face to face, by phone and in writing
- Experience of dealing with customers and understanding their needs
- A high degree of PC literacy and experience
- Ability to meet deadlines
- Able to work year round - unsociable hours; early morning, late evening and weekends
- Able to travel nationwide on a frequent basis which may include overnight stays from home (car and driving licence required – employee must provide business use insurance for their car)
- Able to work on a flexible annualised hours contract (monthly paid for hours worked)
- No experience in technical aspects of insurance products or experience of working in a sales office is required

Note: The role is home based, however in the pre-launch phase Enrollers will working from Basingstoke or Dorking as agreed with the line Manager