

JOB DESCRIPTION

Job Title: Telephonic Enrolment Services Enroller (TES) **Level:** 9SC

Purpose: To explain key facts in relation to Unum Select product choices to employees (no advice is given) and conduct telephonic enrolment services with individual employees.

Reporting To: Enroller Manager

Department: Enrolment

Division: Marketing & Business Development

Key Accountabilities:

- Conduct telephonic enrolment service (TES)
 - Receive inbound calls
 - Answer any questions employees may have on enrolment offer
 - Enrol employee using appropriate application and in accordance with agreed enrolment strategy and appropriate guidelines
 - Make outbound calls to employees spouse to capture details in relation to EOI (evidence of insurability)
- 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
- To disclose information as defined within the enrolment process
- Responsible for ensuring applications are complete and submitted on timely basis
- Work with the enrollers to undertake any enrolment activity to deploy HR solution
- Support the enrolment events as dictated by the business/employer (may require unsociable hours/working patterns)
- Works with the enrolment co-ordinator and escalates any issues arising from the enrolment event
- Records worked hours against Annualised Hours
- Support the Enrolment Organisation on inbound and outbound activity as required
- 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: Dora, WORD, EXCEL & OUTLOOK
- Ability to work and meet deadlines
- Attention to detail

Training Requirements:

- Corporate Induction course (6 weeks 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 (Unum, Select enrolment.com)
- TES specific training

Minimum entry criteria:

- Good level of basic education with aptitude for numeracy and literacy
- Excellent telephone skills and experience of call centre environment
- Good interpersonal skills - ability to communicate by phone and face to face
- Experience of dealing with customers and understanding their needs
- A high degree of PC literacy and experience
- Ability to meet deadlines
- Able to work a non-standard week – annualised hours
- Ability to work unsociable hours, late evenings, days and weekends
- No experience in technical aspects of insurance products or experience of working in a sales office is required