Job Description: Client Development Adviser

Purpose

The Client Development Adviser role is a sales enablement position, responsible for generating and qualifying high-quality leads for the sales team. This role focuses on outbound prospecting, engaging senior decision-makers, and supporting the growth of the business through lead generation excellence under the guidance of the Development Executive.

Scope of the Authority

- Identify and qualify leads, escalating opportunities to the Development Executive or Branch Director for closure.
- Plan and execute outbound prospecting activities within agreed guidelines.
- Escalate high-value or complex prospects to senior team members for strategic engagement.

Role Responsibilities

- Execute outbound prospecting via email, phone, LinkedIn and networking channels.
- Target senior decision-makers and influencers to schedule qualified meetings.
- Track all prospecting activity in Acturis or CRM; maintain accurate, auditable records.
- Support pipeline reporting and provide basic insights on prospect engagement metrics.
- Stay up to date with general insurance industry trends, competitor offerings, and product knowledge.
- Collaborate with Development Executives and sales teams to ensure smooth handover of qualified leads.

This job description provides a general overview of the role and is not exhaustive. It may be reasonably modified or include additional duties to meet the evolving needs of the business. Role responsibilities may vary depending on business requirements and individual skill sets.

Key Performance Indicators (KPIs)

- Number of calls/emails/LinkedIn contacts made per week.
- Number of qualified meetings booked for Development Executives.
- Conversion rate from initial contact to qualified meeting.
- Accuracy and completeness of CRM/Acturis records.
- Timeliness of reporting and submission of prospecting insights.
- Contribution to overall regional pipeline growth.

Note: These KPIs provide the framework for performance measurement. Specific objectives and targets will be agreed with the line manager and reviewed periodically.

Behavioural & Cultural

- Demonstrates company values
- Supports colleagues and team culture
- Active participation in CPD and CII learning

Skills & Experience

- Minimum 12 months' experience in insurance or business development.
- Strong outbound prospecting skills and familiarity with CRM systems.
- Excellent communication and interpersonal skills.
- Organised, able to manage multiple priorities.
- Analytical mindset for tracking and reporting activity metrics.
- Resilient and adaptable in a fast-paced environment.
- Knowledge of general insurance products and regulatory framework.

Professional Behaviours

- Demonstrates integrity, professionalism, and ethical decision-making in all interactions.
- Collaborative and supportive team player, fostering a culture of care and respect.
- Proactive, adaptable, and solution focused.
- Committed to continuous learning and staying current with industry developments.

Compliance Statement

The Development Executive is required to adhere to all relevant regulatory, legal, and company policies in the execution of their role. This includes compliance with:

- Financial Conduct Authority (FCA) regulations and guidance.
- Internal company policies, procedures, and codes of conduct.
- Data protection and confidentiality requirements, including GDPR.
- Health and safety obligations.
- Promptly reporting any potential breaches, risks or incidents to management.

Education / Qualifications

- Hold or achieve Foundation in Insurance (FIT) within two years.
- Commitment to CPD and ongoing learning.

Work Environment

- Office-based with flexibility for hybrid working where appropriate.
- Travel to client sites or other company offices may be required.
- Standard working hours with occasional flexibility to meet operational demands.