

Advantage Business Ltd

JOB DESCRIPTION

Job title

Business Needs Analyst

Purpose

Position Summary

As a key member of the ABL Core Support team the key purpose for this role is to assist in the business development of Advantage Business Ltd and Individual Advisor Practices by:

- Negotiating and arranging appointments for the Advisor body with suitably qualified prospect business owners.
- Close contact with advisors and the advisor support person necessary to ensure the personal targets and goals of each Advisor are satisfied.
- Delivering the activities required to constantly expand the pool of opportunities for core service work by individual practices
- Liaising directly with the individual Advisory practices on effective pipeline management

Specific Duties & Responsibilities

- Working with the Advisory Body + key personnel to support initiatives to develop the ABL and Individual Advisory brands
- Make calls and set advisor appointments by:
 - o Promoting the Advisor according to agreed skill sets and parameters
 - o Using pre-determined marketing campaigns as a means to engage key prospects
 - o Work with Advisors to create unique approaches to specified targets or industry sectors as appropriate
 - o Work with the marketing coordinator to understand any previous contact or collateral targets may have received prior to the phone contact
- Advisor appointment needs are monitored with the Finance + Admin & Financial Controller
- Advisor Special Conditions and needs are followed closely with regard to appointment timing and geography
- Work with the Finance + Admin & Financial Controller to ensure inbound leads are appropriately assigned to an Individual Advisor according to strategic plans and Advisor needs
- Support the rest of the team with sales and phone manner feedback and advice.
- Refer technical support issues to the Advisor + Data support role.
- Identify performance issues with the system and discuss with management.

Key Relationships

- External
 - o Leads and Prospects
- Internal
 - o BNA Team
 - o Advisory Body
 - o Data Cleanser
 - o Marketing Coordinator
 - o Admin / Accounts

General Duties & Responsibilities

- Be punctual and work the hours and times specified.
- Prioritise workload to ensure work of the greatest importance to the business is undertaken with urgency and to a high standard.
- Support and help develop a positive workplace culture.
- Demonstrate excellent interpersonal communication skills.
- Responsibly manage all business resources within accountability levels.
- Undertake all duties and responsibilities outlined in this job description and all other duties as required by the business.
- Comply with all employment obligations.
- Promptly undertake to complete all reasonable and lawful instructions and directions given.
- Serve the business in good faith, promoting and protecting the business's best interests.
- During work time, and such other times as may be reasonably required, dedicate all effort to the execution and fulfilment of the duties, responsibilities, obligations and instructions related to employment.
- Demonstrate through own actions a commitment to Health and Safety at work when undertaking work or observing others in the workplace.

Skills, Experience & Education

Person Specification

Skills

- Computer skills â Keyboard and Database to intermediate level
- Telephone Sales skills to Advanced level
- General administrative process skills to basic level
- Excellent face to face and telephone manners
- Proven general sales skills
- Able to respond effectively to phone challenges, attitudes, and negativity from leads in a positive and friendly manner

Knowledge

- Understanding of the sales / telemarketing cycle
- Understanding of objection handling routines
- Knowledge of professional practice office systems
- Literate and numerate in English to above intermediate level
- Knowledge of email and database systems

Personal

- Excellent interpersonal skills
- Able to work well in a small team
- Able to work on own initiative
- Well-presented and professional appearance
- Reliable and punctual, dependable
- Able to handle stress constructively (solid strategies)
- Good and robust sense of humour
- NZ Resident or citizen

Qualifications and experience

- At least 3 years Sales / Admin / Telemarketing experience
- At least 2 years computer operation / database experience
- Experience in minor decision making roles
- Experience in busy, varied, demanding environment