

## Job Description

<b>Title:</b>	MT-Intern/CRE/Sr. CRE	<b>Location:</b>	Venue location
<b>Job Grade:</b>	Executive Level	<b>Reports to:</b>	Venue Manager
<b>Band:</b>	B4	<b>Business Unit:</b>	IPC
<b>Department:</b>	Sales		

### Job Summary

This job is responsible for giving presentation to walk in venue clients regarding their financial planning needs. Analysing financial needs of the customer and suggesting them best available product. Maintaining good relationship with clients and providing timely services. Collecting timely renewals and promoting cross sell and up sell to existing clients.

### Minimum Requirements

Qualification:	Final Year Students
Experience:	<= 1 year
Technical skills/ knowledge required:	<i>Basic knowledge of insurance and selling skills</i>

### Job Magnitude

Controls Revenue/Budget:	Revenue	Internal Customers:	NA
Scope of Job:	Own Work (1)	External Interactions:	Clients
Span of Control:	Nil		

### Key Responsibility Areas

- To give proper financial presentation to all walk in clients on daily basis*
- To take 5 references from each walk in client and work towards calling them in the venue*
- To check and collect documents from the clients and also ensure timely issuance of insurance policy*
- To collect premium amount from the clients and timely deposit the same to Operation Executive/ Venue Manager on daily basis*

## Job Description

### Responsibility Areas

*To provide personalized Claim Settlement Services to the clients*

*To provide clients comprehensive financial planning advice with emphasis on L.I. And G.I.*

*To make direct calls and generate business through referencing and corporate clients*

*Provide proper service to clients with relation to any queries related with products offered to them*

*To attend various training programs for development of product knowledge*

*Ensure timely Renewal of all policies of all clients assigned and also do cross selling / upselling to existing clients*

### Key Performance Indicators

1	<i>Conversion rate to be maintained at 70% and above</i>	2	<i>Issuance rate to be maintained between 90% - 95%</i>
3	<i>To ensure that clients are given feedback related to their proposal on the same day or within one day of the presentation</i>	4	<i>100% achievement of monthly assigned targets</i>
5	<i>95% plus Renewal ratio to be maintained.</i>	6	<i>Should cross sell / upsell at least 1 additional product to each client. 100% achievement of Subsequent Fresh targets</i>

*The above statements are intended to describe the general nature and level of work being performed by people assigned to this classification. They are not to be construed as an exhaustive list of all responsibilities, duties, and skills required of person*

Incumbent's Name, Sign	Date

Reviewed by: Name, Sign	Date

JD Code: \_\_\_\_\_

Approved by: Name, Sign	Date

## Job Description

<b>Title:</b>	<b>MT-Tele Intern/CCE/Sr. CCE</b>	<b>Location:</b>	<b>Venue location</b>
<b>Job Grade:</b>	<b>Executive Level</b>	<b>Reports to:</b>	<b>Tele supervisor</b>
<b>Band:</b>	<b>B4</b>	<b>Business Unit:</b>	<b>IPC</b>
<b>Department:</b>	<b>Sales Support</b>		

### Job Summary

This job is responsible for generating footfall of clients at local venue by calling clients. Leads can be generated through calling on data provided by Survey team or self generated leads by cold calling. Informing clients about presentation details and following up with clients to reach our office on time and before fixed time. Generating referrals from clients maintaining MIS.

### Minimum Requirements

Qualification:	Final Year Students
Experience:	<= 1 year
Technical skills/ knowledge required:	<i>Basisc knowledge of insurance and selling skills</i>

### Job Magnitude

Controls	<i>Neither</i>		
Revenue/Budget:		Internal Customers:	<i>Tele superviosr, Tele manager</i>
Scope of Job:	<i>Own Work (1)</i>	External Interactions:	<i>Clients</i>
Span of Control:	<i>Nil</i>		

### Key Responsibility Areas

*To generate leads by making outbound cold calling*

*To inform prospective clients about our company and the presentation program and invite them at local IPC*

*To manage leads properly i.e. all hot leads generated for the Insurance Planning center*

*To make minimum 60 number of calls in a day*

## Job Description

### Responsibility Areas

*To adhere to the official script as prescribed by Company*


### Key Performance Indicators

1	<i>To ensure monthly assigned incentive targets as prescribed by Co. are achieved</i>	2	<i>To achieve 20% of closing rate on the leads provided</i>
3	<i>To ensure that minimum 40% of the Qualified clients in a month is through cold calling.</i>	4	
5		6	

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\_\_\_\_\_  
Incumbent's Name, Sign    Date

\_\_\_\_\_  
Reviewed by: Name, Sign    Date

JD Code: \_\_\_\_\_

Approved by: Name, Sign    Date

## Job Description

<b>Title:</b>	<b>MT-DSE INTERN/DSE/ SR. DSE</b>	<b>Location:</b>	<b>Venue location</b>
<b>Job Grade:</b>	<b>Executive Level</b>	<b>Reports to:</b>	<b>TL-DSE</b>
<b>Band:</b>	<b>B4</b>	<b>Business Unit:</b>	<b>IPC</b>
<b>Department:</b>	<b>MARKETING</b>		

### Job Summary

This job is responsible for generating good quality data of clients by doing various Below the line activities. Performing various field, colleges, society, coupon filling and door to door activities for lead generation. Punching data in to the online data base. sharing data MIS with Survey supervisor on daily basis.

### Minimum Requirements

Qualification:	Final Year Students
Experience:	<= 1 year
Technical skills/ knowledge required:	<i>Basisc knowledge of insurance and out door activities</i>

### Job Magnitude

Controls Revenue/Budget:	<i>Revenue</i>	Internal Customers:	<i>Survey supervisor, TL-CS, VM, ZMM</i>
Scope of Job:	<i>Own Work (1)</i>	External Interactions:	<i>Clients</i>
Span of Control:	<i>Nil</i>		

### Key Responsibility Areas

*To conduct various below the line activities for lead generation( like petrol pump activity, School drawing competition & door to door activity etc*

*To meet clients and convince them to fill company coupons as per company pitch*

*Enter generated lead in to the online data base of company*

*Share lead generated MIS with survey supervisor on daily basis.*

