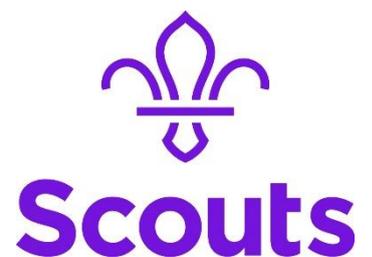




# Applicant Information Pack

## New Business Account Handler

 **Lancing, West Sussex**



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# Welcome

We're Scouts and everyone's welcome here. All genders, races and backgrounds. Every week we give almost half a million people aged 6-25 the skills they need for school, college, university, the job interview, the important speech, the tricky challenge and the big dreams: the skills they need for life.

At a time when communities are becoming more divided, we bring people together. We encourage our young people to do more, learn more and be more. We're a worldwide movement, creating stronger communities and inspiring positive futures. We welcome talent from all backgrounds and your contribution to help even more young people succeed in life.



Carl Hankinson, UK Chief Commissioner



Matt Hyde, Chief Executive



**“As a young boy, Scouting gave me a confidence and camaraderie that is hard to find in modern life. Kids in the UK need a sense of belonging and community more than ever. I’m proud to be the Chief Scout in the world’s greatest youth movement. It is the biggest privilege I have ever had – more than [serving in] the SAS or [climbing] Everest.”**

**Bear Grylls, Chief Scout**



# Our strategic plan

## Skills for Life

### Our plan to deliver better futures

#### Our vision

By 2025 we will have prepared more young people with skills for life, supported by amazing leaders delivering an inspiring programme.

We will be growing, more inclusive, shaped by young people and making a bigger impact in our communities.

#### Our mission

Scouting actively engages and supports young people in their personal development, empowering them to make a positive contribution to society.

#### Our values

We act with care, respect, integrity, cooperation, exploring our own and others' beliefs.

#### Our goals

Our plan is to build on the success of the previous plan: to continue to grow, become more inclusive, to be shaped by young people and to make a bigger impact in our communities. We have set new goals for 2025.

Growth	Inclusivity	Youth Shaped	Community Impact
<ul style="list-style-type: none"> <li>50,000 more young people aged 6-18 in Scouts</li> <li>10,000 more frontline adult volunteers (Section Leaders and Assistant Section Leaders)</li> <li>5,000 more Young Leaders</li> </ul>	<ul style="list-style-type: none"> <li>we will have started Scouts in 500 more areas of deprivation reaching young people who could benefit the most</li> <li>our adult volunteers will reflect the demographics of our society</li> </ul>	<ul style="list-style-type: none"> <li>250,000 young people will be shaping their experiences at Scouts</li> <li>50% of young people will be achieving the top awards</li> </ul>	<ul style="list-style-type: none"> <li>at least 250,000 young people will be making a positive impact in their community each year</li> <li>50% of young people will be achieving the top awards</li> </ul>

#### Our programmes of work

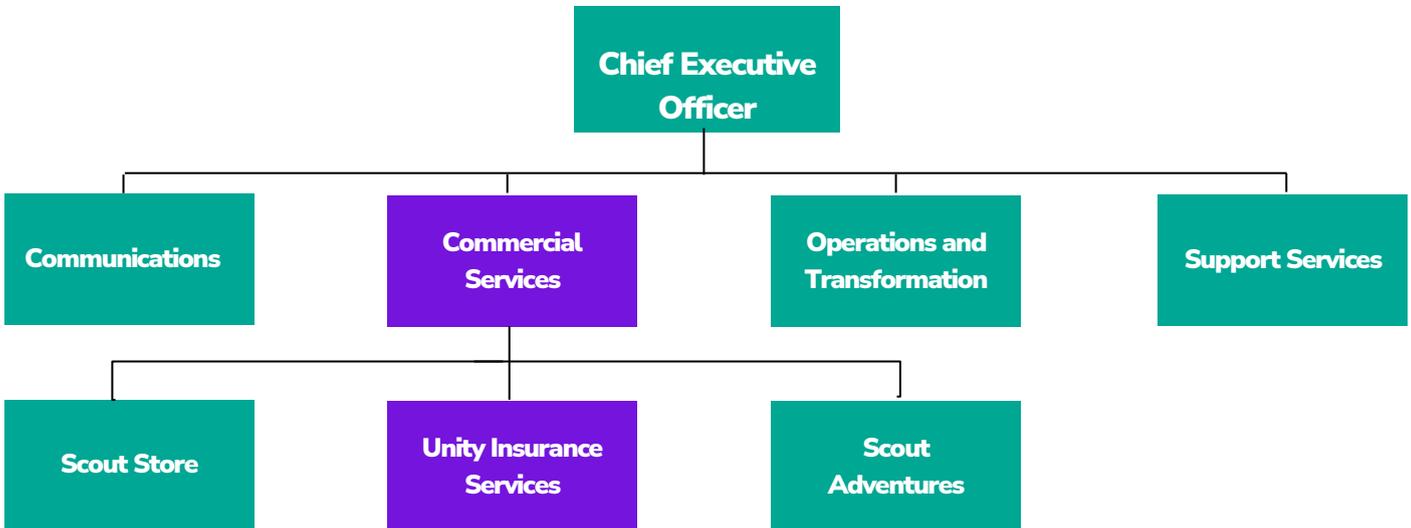
Due to the impact of COVID-19, our Skills for Life strategy has been extended until 2025. The programmes of work that'll help us to achieve this strategy have been revised to: People, Programme, Perception, Digital and Early Years.

We're involving people on the ground every step of the way in the updated strategy, to make sure anything new works for the majority and genuinely make things better, easier and more fun.

<p><b>Programme</b></p> <p>A fun, enjoyable, high quality programme consistently delivered and supported by simple (digital) tools.</p>	<p><b>People</b></p> <p>More, well trained, better supported and motivated adult volunteers and young people, from diverse backgrounds.</p>	<p><b>Perception</b></p> <p>Scouts is clearly understood, more visible, trusted, respected, and widely seen as playing a key role in today's society.</p>
<p><b>Digital</b></p> <p>Embedding our digital principles and transforming the Scouts experience with better digital tools.</p>	<p><b>Early years</b></p> <p>Provide more young people with skills for life through a new section for four and five year olds.</p>	

# Our structure

The UK headquarters of the Scouts is based at Gilwell Park (Chingford, London), and is operationally divided into four directorates:



## Unity Insurance Services

Unity Insurance Services have been insuring Not for Profit organisations for over 80 years. We're an experienced insurance broker that understands the needs of charities and community groups. We know the importance of having insurance policies that can be trusted. That's why we work hard to find simple solutions to complex needs. We offer specialist services to Scouts, Girlguiding, charities, community groups and not-for-profit organisations; all with an experienced and empathetic approach to our customers. We're owned by the Scouts, a charity in its own right, and like them we understand the importance of making a difference to the lives of others. We share the same values of integrity, respect, care, belief and cooperation.

With all our profit going back into The Scout Association, each day we are contributing to young people gaining Skills for Life.

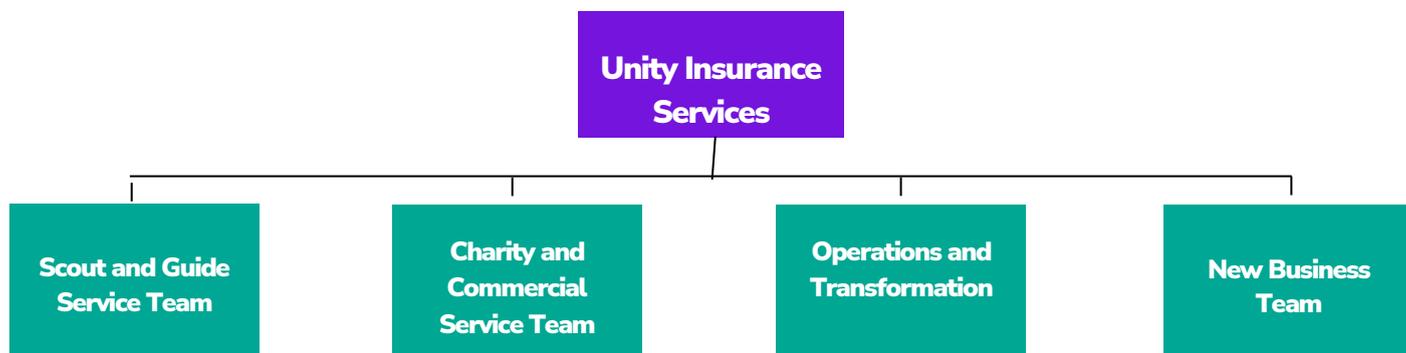
We are a growing business that places importance both on bringing in new clients but also on providing a great service to existing clients. This has been reflected in our customer feedback, where in 2018, 80 per cent of customers said they would recommend us based on our service.

Developing our people is the key to our success and something we value greatly.

Our strategic aim is to be the insurance broker of choice for the charity sector and we welcome talent to join us in achieving this aim.

# Team structure

Unity Insurance Services is based in Lancing West Sussex.



## The role

<b>Responsible to:</b>	New Business Team Leader
<b>Department:</b>	New Business Team
<b>Base Location:</b>	Lancing, West Sussex
<b>Term:</b>	Permanent
<b>Salary:</b>	£ 25,134 per annum, Band D level 3
<b>Hours:</b>	35 hours/week
<b>Line Management Responsibility:</b>	None
<b>Budgetary responsibility:</b>	None
<b>Internal Relationships:</b>	Director of Commercial Services, MD, senior managers and other Unity colleagues.
<b>External Relationships:</b>	People and organisations from the Scouting, Guiding and charity sectors. Suppliers and service providers, insurers and the general public.
<b>DBS:</b>	<b>Basic</b>

*The above list is provided for guidance only and is not an exhaustive list of all the contacts with whom the post holder may be required to liaise.*

# Core purpose

The New Business Account Handler is a telephone based insurance business development role, focussed 100% on acquiring new business, to help accelerate sales growth from our core charity markets.

Your role will therefore be to act as a New Business contact for Unity's portfolio of prospects and clients, comprising of small/medium size charities for their insurance requirements.

You will:

- Be an experienced insurance sales professional ideally from a commercial broking/property owner's insurance background with strong business development skills.
- Provide a high quality, 'right first time' approach to service resulting in high levels of client satisfaction and business acquisition.
- Work on various new business campaigns to target new prospects and also to cross sell and up sell to existing clients.
- Achieve revenue targets for both new and existing business as well as lead generation targets in accordance with company procedures and regulatory requirements.
- Provide a seamless end to end service to clients ensuring efficient administration and management of new policies and the overall client relationships through excellent service.

# Key tasks

## New Business Generation

- Achieve targets set in respect of new business growth and lead generation and other key performance indicators
- Lead generation on various new business campaigns
- Offer information, guidance and quotes to prospects in respect of their insurance needs and converting these to clients
- Complete the key task of "fact finding" to identify clients' requirements and to provide a quotation to fulfil their needs
- Use the information gathered, to determine which insurers will provide the most competitive rates for the covers required
- Obtain quotations, using quotation systems, rating guides or by referring to insurers
- Communicate quotations, advising the most appropriate in terms of price and cover to meet the prospect's needs
- Discuss any "additional" covers to ensure that all insurance requirements are satisfied
- If the quote is accepted verbally, issue written confirmation, providing full details of cover, enclosing proposal(s) for completion and other documentation required to comply with FCA regulation
- Scrutinise new business documents received from insurers making sure they are accurate before issuing to clients
- Issue invoices and policy documents and update client records
- Chase and receive payments by cheque, credit card and direct debit
- Cross sell and up sell products to existing clients
- Offer information, guidance and quotes to existing clients in respect of their insurance needs □  
Respond quickly and effectively to client requests relating to their insurance requirements □  
Develop a positive relationship with clients and show them where they can obtain better value on

- other insurances they hold
- Other duties and responsibilities as may be needed to aid business development

### **Client Service**

- Provide additional advice to clients as required on risk related matters
- Provide back up to existing client business as and when required
- Pro-actively review all insurance procedures in use and suggest continual improvements as part of Treating Customers Fairly initiatives.
- Occasional attendance at customer events as needed

## **The person**

A unique and exciting opportunity has arisen for a highly motivated and driven New Business Account Handler to join a leading and forward-thinking organisation based on the south coast.

As a New Business Account Handler, you will play an integral role to the success of this business, proactively developing and growing our charity insurance clients.

### **Experience**

- Knowledge of charities insurance needs
- Knowledge and experience of FCA Compliance and TCF practices
- Computer literate and experience of using insurance systems
- Professional insurance qualifications – Cert CII or Diploma in Insurance
- Experience and track record in new business sales
- Experience of working in the commercial insurance and broking industry
- Must be able to demonstrate experience of insurance broking and ability to negotiate successfully with insurers to achieve best solutions for clients
- Must be able to advise on, sell and service all classes of commercial insurance products
- Experience in selling, broking and advising on small charities insurance and direct dealings with charity clients
- Ability to develop solutions to customers insurance requirements

### **Skills, abilities and knowledge**

- Commitment to providing the best level of service
- Sales, influencing and negotiation skills to achieve targets and best outcomes for clients
- Ability to generate own leads, follow up and convert business
- Excellent telephone sales skills
- Excellent customer service skills
- Strong communication and interpersonal skills
- Ability to work to targets
- Ability to work to deadlines and/or under pressure
- Good organisation skills
- Team player
- Ability to deal with difficult situations and customers
- Display positive attitudes and a can do approach with a fit to working in a values based company

### **Values and personal qualities**

- A self-aware, positive and approachable.
- An effective individual who is assertive, energetic, determined, robust and sufficiently resilient to cope with the demands of the role.
- An excellent role model who promotes high standards of integrity, and commands trust and

confidence from others.

- Open, confident and collegiate with the ability and willingness to challenge constructively, and to receive challenge, and to work effectively internally and externally.
- Willingness to go on training course relevant to the role.

## Other essential criteria

- Work as an effective member of Unity team
- Comply with all business and office procedures and FCA rules
- As a committed member of the team, you must be flexible and adaptable in terms of whatever may be required of you
- Ensure relationships with insurers are enhanced through your professionalism
- Follow all procedures to protect the client, us and the insurer
- Ensure all relevant information is given to the client as required
- Take responsibility for your personal development in terms of understanding the policies, procedures, the legal and regulatory framework and to share this knowledge with your colleagues.
- Ensure you act in accordance with current regulatory procedures



### **Safeguarding rules – yellow card**

We are a youth organisation who takes safeguarding seriously. The post holder agrees to comply at all times with the safeguarding rules as set out on The Scout Association's yellow card, [which can be found here](#). This is shared with young people and carers, as well as employees, so everyone knows our rules of engagement.

In order to comply, stringent vetting procedures take place including checking against an internal database to assess suitability and also Basic/Enhanced DBS checks as required.

### **GDPR and data protection**

The post holder hereby agrees not to disclose any confidential or sensitive information to a third party or outside organisation except where required to do so by law and to adhere to our Data Protection and GDPR policies

### **Health and safety**

The post holder agrees to abide by The Scout Association's Health and Safety principles and code of conduct and to take all reasonable steps to ensure both their own safety in the work place as well as that of their colleagues.

### **Equal opportunities**

The Post holder agrees to promote and uphold the principles of equal opportunities in accordance with The Scout Association's Equal Opportunities Statement and all related policies.



# Benefits

- **Holiday Entitlement:** 25 days per year plus bank holidays. This increases after two years service to 28 days and after five years to 32 days.
- **Additional Holidays:** We operate an office closure during the Christmas and New Year holiday period that provides up to an additional 3 days of extra leave.
- **London Weighting:** In addition to a competitive salary we also provide London weighting to staff if located inner/outer London.

## Looking after your health and wellbeing

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### Simply Health Scheme

You will have access to a medical scheme to help you with the cost of your everyday healthcare fully funded by the Association such as optical, dental and many more. You will also get access to the Gym discount, family days out discount and online health risk assessment.

### Sickness absence

We pay sickness above the statutory minimum requirement.

(Above benefits apply to employees upon completion of three months in their role unless otherwise stated)

## Looking after your future

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### Generous Pension Scheme

We are committed to providing our staff with a best work place pension scheme that is highly competitive in the third sector. For all employees, the Association has a Group Personal Pension Plan with the Scottish Widows.. This plan allows employees to contribute a minimum of 2% of their gross salary up to the maximum allowed within HMRC limits. The Association will contribute twice your contribution, up to a maximum of 10% of gross salary. Employees can benefit further by saving your own and the The Scout Association's National Insurance contribution that is paid into your pension pot.

### Life Assurance

All employees are covered by a scheme which pays four times the basic salary in the event of death in service.

## Getting to and from work

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### Car parking

All sites offer free car parking to employees.

### Minibus Service (Gilwell Park)

A minibus service is provided which collects colleagues from Chingford Station. This service also drops colleagues off to the same location. This service operates through the day and is more frequent at the start and end of the day.

### Cycle to Work scheme

This scheme is a form of salary sacrifice which enables employees to purchase a bicycle through the Government's Cycle to Work Scheme and can save you up to 42% on the retail value (depending on the employees tax bracket).

## We are proud to be a family friendly employer

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### Personal Days

Up to four personal days paid leave a year.

### Maternity/Paternity Leave

We pay maternity leave above the statutory minimum requirement.

### Childcare Vouchers

This scheme is a form of salary sacrifice, enabling employees to purchase childcare vouchers.

### Start and finish time

Employees can apply for some flexibility on their start and finish times of work.

## Making your money go that little bit further

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### Scout Store purchases

Employees can make purchases from Scout Store with a discount of 25% on certain items, excluding uniforms.

### Online Benefits Portal

Our online benefits portal allows you to tailor make your own benefits package.

## Developing yourself and others

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### Study and volunteer leave

Special leave includes paid leave for volunteering and study leave.



# How to apply

Before making an application please ensure that you have read the [Recruitment and Selection Policy](#).

Please submit an application via the apply link on [our jobs page](#).

In order for us to monitor the application of our [Equal Opportunities Policy](#), we would be grateful if you would also complete the Recruitment Monitoring questions on the Application Form.

**Closing date for applications – Wednesday 16 February 2022, 11:59 pm.**

**Interviews will be held late on late February 2022.**

If you would to discuss the role in more detail, please contact our [Recruitment Team](#)



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