

## JOB DESCRIPTION

### Basic Information

<b>Position Title</b>	AFE-SBDM	<b>Internal Designation</b>	Relationship Manager
<b>Job Role</b>	Front Line Sales	<b>Reporting to</b>	Area Sales Head
<b>Sub LOB / Department</b>	Direct Sales	<b>Location</b>	Pan India
<b>Total Headcount (Direct) Supervised</b>	NA	<b>Total Headcount (Direct / Indirect) Supervised</b>	NA

### Job Purpose

- To offer customized insurance solution to the customers for all their financial needs and act as an interface between customer and company

### Key Responsibilities

<b>Responsibilities</b>	<ul style="list-style-type: none"> <li>To direct sell to the customers via appointments ( Office/ Home visits).</li> <li>To ensure that leads/ appointments allocated by the call center are attended and revenue is generated</li> <li>To ensure Self Sourcing Targets are achieved</li> <li>To ensure business Reporting, MIS on sales call ( LMS) , Lead Utilization and conversion are updated and maintained on a daily basis</li> </ul>
<b>Specific Authorities( Financial &amp; Non Financial)</b>	<ul style="list-style-type: none"> <li>NA</li> </ul>
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>New Business Target Achievement = 100%</li> <li>Renewal Business = 85%</li> </ul>

Job Requirements	
<b>Qualifications</b>	10 <sup>th</sup> Pass Minimum Qualification , proficiency in MS Excel
<b>Experience</b>	Minimum 1 year of Sales experience, Life Insurance Direct Sales experience preferred
<b>Functional Competencies</b>	<ul style="list-style-type: none"> <li>• Knowledge of Financial Markets</li> </ul>
	<ul style="list-style-type: none"> <li>• Sales Process Implementation</li> </ul>
	<ul style="list-style-type: none"> <li>• Business Planning</li> </ul>
	<ul style="list-style-type: none"> <li>• Competition Benchmarking</li> </ul>
<b>Behavioral Competencies</b>	<ul style="list-style-type: none"> <li>• Anticipate and leverage business opportunities</li> </ul>
	<ul style="list-style-type: none"> <li>• Build customer relationships</li> </ul>
	<ul style="list-style-type: none"> <li>• Customer orientation</li> </ul>
	<ul style="list-style-type: none"> <li>• Take accountability for results</li> </ul>

Key Interactions	
Internal	Nature or purpose of interaction
<b>Branch Operations</b>	<ul style="list-style-type: none"> <li>• Coordinating for Business logins and details on policy</li> </ul>
<b>IT - Application</b>	<ul style="list-style-type: none"> <li>• LMS related operational requirements for affiliate campaigns</li> </ul>

<b>Documented By</b>	<b>Relationship Manager</b>
<b>Approved By</b>	<b>National Sales Manager – Direct Sales</b>
<b>HR certification By</b>	<b>CHRO</b>