



New Business Associate

Job Purpose

The role of the New Business Associate (NBA) is to identify new business opportunities and potential new clients, feeding our advisor teams with solid prospects. The NBA will be responsible for building quality relationships with potential customers to enable the business to identify further prospects. This role requires someone who keeps up with trends and opportunities in the market, ensuring that we are proactive and in the right place at the right time.

Knowledge & Skills

- Proven experience with a similar role.
- Strong across industry knowledge of financial services.
- Strong IT skills, with previous experience working on a CRM.
- Strong organisational skills with the ability to manage workloads.
- Experience working in a sales environment, with knowledge of B2B sales.
- Ability to build, nurture and retain strong business relationships.
- Ability to identify business needs.
- Ability to identify and prospect new customers, and/or new products to existing customers.

Duties & Responsibilities

- Identify potential new customer leads.
- Develop relationships with customers, connect with key business executives and stakeholders to identify any opportunities.
- Identify new business opportunities through prospecting new customers.
- Work in a target driven environment whilst maintaining professional standards.
- Maintain good relationships with business introducers.
- Guide clients with initial first steps of asset finance.
- Meet assigned monthly and annual KPI Metrix.
- Continuously develop, demonstrate and maintain knowledge of the asset finance industry and in-depth customer industry knowledge.



Initiative & Decision Making

- Decisions are made and actions taken in accordance with defined policies and practices, the individual must have the ability to work following defined policies and procedures.
- Independent action involving the exercise of some judgment and initiative is taken from time to time as required within broad policy frameworks and in accordance with generally accepted practices.
- Ability to work interdependently and part of a team.
- Self- motivated and able to work independently and as a key member of a small team and work to targets.

Degree of Responsibility

- There is responsibility for carrying out specified tasks efficiently and effectively in accordance with the system processes.
- There is no responsibility of resource (people, equipment or money).
- The responsibility of carrying out a range of tasks important to the effective performance of the team.

Contacts and Communication

- Confidence to communicate effectively with customers and stakeholders.
- Frequent contact is made with customers at all levels in different industries.
- Ability to be persuasive with customers and sell One. vision.
- Making a quick and favourable impression on customers.
- Use a range of communication skills and methods.
- Communicate effectively with all areas of the business.

Complexity

- Work involves similar range of tasks which are closely related to one another and require the continuous exercise of a particular type of skill within a clearly defined area of activities.
- Work to targets and goals which are set in annual appraisal.

Apply Now:



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