Hiring Manager Briefing Document

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| Job Title: Protection Consultant  | Posting Title (External):Telephone Account Manager/Executive  | ATS Requisition ID: | Number of Openings: 2 |
| Is this role confidential?Choose an item. | Office Location:Choose an item. | Department:S & R sales/ Protection  | Reporting Structure (above and below):Into Karen Ball  |
| Salary Information: | Band:B | Minimum | Benchmark | Maximum | Additional notes on Salary and Benefits:OTE upto 50% of Salary  |
| 27800 | 33700 | 40900 |

The Role

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| Why has this role been raised? – New role in business, resignation etc.Mark is retiring – someone left to become advisor wants to return -  |
| *Role working Patterns:** FT/PT?
* Home-working/Remote working? Homebased
* How many days per week/month are they required in the office?1/2 expenses met
* Working hours per week? 35
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| *Overview of the team & Working Environment* * Main stakeholders in this role they would be working with?
* Team layout – Direct reports etc?

Work in team of Protection Consultants, and BDM’s (no direct reports)  |
| *Overview of the role – what does a typical day look like (explain this to me in detail, what will they actually be doing on a day to day?)* * General overview of the role- how would I position this to someone outside of LV.
* What are the main deliverables?
* Main projects involved in vs BAU- % of projects vs BAU.
* Acronyms in job description?
* What do you need to deliver in the first 12 months.
* Career development opportunities

Make and build on excisting relationships with IFA’s to promote/educate on LV productsyOU will be targeted on Revenue cming in so will need sales b/g and working to targets FS exp would be preferred but not essential Bonuses similar to sales staff, but could earn upto 50% of base Slary in bonuse, paid out March/September (do not get usual annual bonus as well) |
| What training is provided and what is the potential career path? *Formal OR Informal Training? Time off to study? …. Can you tell me about any success stories about people that have progressed through this career path? Where are they now? Where did they come from?* |

The Person

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| *What sectors/Companies would a strong candidate come from, Sectors and Companies (for Direct approaches)* |
| *Different job titles someone in this role would have?* |
| *Skills and experience required:* Essential: Sales/targeted b/g Desirable: FS exp Ask further questions to ensure scope is wide to attract suitable candidates |
| *Any internal / workmate referrals to consider?*Names: |

Selection and Interview Process

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| *Will this be a 1 or 2 stage interview*? 2 |
| *Informed hiring manager another interviewer must be present to take notes etc*.? Yes |

*Sourcing Strategy and next steps:*

Advert approval and time frame: Please advise Hiring Manager that we will draft an advert for posting and would help the process if they could respond within 48 hours

Role will be advertised for 2 weeks (unless otherwise agreed)

LinkedIn posting – We have limited slots available on LinkedIn so please be mindful of this when hiring manager request a LI post

We will follow up this briefing meeting with an email detailing what has been agreed and send an advert over to the HM for approval.