

# PERFORMANCE MAP: ARM

<b>Objectives</b> <ul style="list-style-type: none"> <li>Proactively support the team to enable annual income targets to be exceeded</li> <li>Own and drive the Insurance Sales within the Centre</li> <li>Maximise group income through management of an assigned portfolio/within RM portfolio</li> <li>Achieve and maintain a high level of customer satisfaction</li> <li>Manage risk - operate within company standards</li> </ul>	
<b>Performance</b> <ul style="list-style-type: none"> <li>Transact quotes and follow up</li> <li>Preparation and administration of credit proposals, searches, GCAS, etc.</li> <li>Preparation of documentation for transaction and payout</li> <li>Customer and supplier interface – invoices, quotes, settlements, asset inspection, sign up</li> <li>Marketing new and existing customers in co-ordination with RM standards to include: research, canvassing and mail shots</li> <li>Sales management systems prompts</li> <li>Managing designated customer relationships</li> <li>Bank and JV partner liaison</li> <li>Additional sales administrative support as required</li> <li>Actively keep updated on relevant intranet information</li> <li>Resolicit Insurance Opportunities</li> </ul>	<b>People</b> <ul style="list-style-type: none"> <li>Flexible approach and versatility to complement Sales Team activities</li> <li>Be an active Team Player, within the wider team</li> <li>Build strong, effective relationships with Functions and Business Partners</li> <li>Own your personal development plan; understand strengths and weaknesses in relation to the job competencies</li> </ul> <b>Career Mapping Examples</b> <b>From:</b> <ul style="list-style-type: none"> <li>UKCB</li> <li>Retail Bank</li> <li>Product Partners</li> </ul> <b>To:</b> <ul style="list-style-type: none"> <li>Relationship Manager</li> <li>Functions</li> <li>Product Partners</li> <li>UKCB</li> </ul>
<b>Outstanding Behaviours</b> <ul style="list-style-type: none"> <li>Determination to make it happen</li> <li>Continually show positive attitude and a 'can do, will do' approach</li> <li>Act entrepreneurially - finding a solution - catalyst</li> <li>Be a selfless team player - ability to balance team and personal objectives</li> <li>Continually show energy and enthusiasm</li> <li>Support RM to become a trusted Business Partner</li> </ul>	<b>Desirable Examples / Start or Continue:</b> <ul style="list-style-type: none"> <li>Effective delegation of non-income generating responsibilities</li> <li>Trusting other partners/departments to do their part</li> </ul> <b>Undesirable Examples / Stop:</b> <ul style="list-style-type: none"> <li>Updating own MI</li> <li>Handling customer service issues that belong elsewhere, e.g. lost cheque or paperwork</li> <li>Making excuses</li> </ul>
<b>Partnerships</b> <ul style="list-style-type: none"> <li>Always put customers first</li> <li>Take ownership of designated primary relationships</li> <li>Know Relationship Manager's most important Customers and underlying strategy</li> <li>Ensure effective resolution of customer complaints</li> <li>Maximises settlement opportunities</li> </ul>	<b>Process</b> <ul style="list-style-type: none"> <li>Proactively follow up quotes</li> <li>Ensure sales management system prompts are effectively actioned</li> <li>Share and implement best practices</li> <li>Ensure documentation is completed to required standard – with Right First Time Statistics to be 90%+</li> <li>Adherence to current compliance requirements</li> <li>Open communication with Sales Team – including wider Regional Team</li> <li>Daily progress report and review of business with immediate Sales Team</li> </ul>
<b>Measures</b> <ul style="list-style-type: none"> <li><b>Financial Performance:</b> weekly and monthly official MI including default</li> <li><b>Staff:</b> implement climate scan action plans, productivity, absence, performance against PDP</li> <li><b>Customers:</b> customer retention, customer satisfaction survey, new and existing customer income growth</li> <li><b>Operational:</b> key control and credit audit, error rates recorded by Manufacturing</li> </ul>	