

TAKE THE
FIRST
STEP ...

...TOWARDS A CAREER
WITH A DIFFERENCE



Visit Us @
careerwiser.co.uk
facebook.com/careerwiser
twitter.com/CareerWiserUK

THE CAREER OF AN INSURANCE CONSULTANT

STARTING at Be Wiser as an Insurance Consultant means you'll have joined the third largest industry in the world, employing around 350,000+ individuals. 66% of this number work in secondary services such as brokers, like Be Wiser.

So to take the first step towards a career within this vast industry means that any experience gained from working with us will give you many career opportunities in the future.

One of the ways that Be Wiser helps you begin this exciting journey is the training and education that you receive in the early part of your employment through business knowledge and insurance qualification. We will then build on this so you become multi-skilled within the company.



THE BENEFITS OF BEING MULTI SKILLED

Learning all aspects of the business and being able to take all types of customer calls will enhance your overall understanding of all the departments and enables you to consider how each role you perform fits into the whole customer journey. It will also add value and variety to what you do on a daily basis and what you can give to each department with this enhanced knowledge. Ultimately it will make you a superior Insurance Consultant, opening up opportunities for you to progress into more technical or managerial positions further on in your Be Wiser career.

SETTLING INTO YOUR TEAM

NESTING

After completing training for a role we ensure that before you take customer calls within a team, you will have a Team Leader from the Training Department support you through a Nesting period – the purpose being to help you settle with ease into the busy atmosphere and build your confidence.



Your Team Leader will use their experience to share best practice whilst you interact with customers and colleagues. There is also a dedicated Coach who will give you feedback and coaching on live calls and give guidance on understanding your targets, the performance data that is available and give suggestions on how to achieve them. Whilst in the nest you have access to over a thousand E-Learning tutorials. These have been sourced to improve and nurture your skills. Face to face training will also be available from our internal trainers who provide structured and motivational training courses that fit your needs within the role. Once you have been signed off from nesting, you will join one of our departments and begin the next step of your journey.

PERFORMANCE & BEHAVIOUR

In order to be selected for the next stage of your multi-skilled journey, your performance and behaviour are reviewed against set criteria. It's important that there is a good balance between your performance (ie hitting targets and following processes) and your behaviour (ie your professionalism and attendance), demonstrating the right attributes at all times.

YOUR FIRST FEW WEEKS EXPLAINED

Your First Day

Company Orientation

This includes a guided tour of all the departments, a presentation from a member of our Personnel Team, an introduction to the company and have expectations outlined for your career journey through Be Wiser.



Week 1

Be Wiser Induction

Covering all aspects of Wiser Connect to prepare you for taking calls in Week 2



Week 2

Nesting

You will take calls under the "Nesting" stage of your training where you will have close supervision, call coaching and training support.



Weeks 3 - 5

Wiser Connect Department

Working within a team taking customer calls



End of Week 5

Review

Based on Performance and Behaviour



Option 1

Continue in the Wiser Connect Department to build further confidence and knowledge when dealing with customers and enhance performance



Option 2

If you are demonstrating the attributes to join Sales you receive a further two weeks of training, followed by Nesting. If signed off by your trainer you remain within Sales until further multi-skilling is planned.



Option 3

If you are demonstrating the attributes to join Customer Service you receive a further two weeks of training, followed by Nesting. If signed off by your trainer you remain within Customer Service until further multi-skilling is planned.



If it is felt more experience is needed, then further time may be spent in Wiser Connect to build further knowledge and confidence.



WHAT HAPPENS NEXT?

QUALIFICATIONS

In your fifth month of employment with the company you will be provided with the final element of examination training that will give you the opportunity to gain your "Certificate of Insurance". This opportunity will be based on you having received positive feedback in your reviews with the strong probability of passing your probation.

SUCCESSFUL PROBATION

If your probation is successfully confirmed after your first contractual six months with the company you will be eligible for a pay review if you are Cert Cii qualified.

BY YEAR END

Training will continue to be provided throughout your first year to enable you to become a Multi-Skilled Insurance Consultant. This allows you to work in a number of areas to gain more knowledge but also evaluate which area best fits your skills and abilities.

This also allows the company to have more flexibility to allocate staff into areas as the business demands and ensures that the customer has a positive journey by talking to experienced insurance professionals. An example of a typical Multi Skilling training timetable is shown below:

Current Dept	Training In	When
Sales	Customer Service	Within Months 7 & 9
Sales	Renewals	Within Months 10 & 12
Customer Service	Renewals	Within Months 7 & 9
Customer Service	Audit & Customer Care	Within Months 10 & 12
Renewals	Audit & Customer Care	After 5 – 6 months of working within Renewals

When you are multi-skilled and required to take calls in another area/department that you have been trained for you will be provided with a refresher training session followed by a call sign off which will last approximately 3-4 days.



GOOD LUCK IN TAKING THAT FIRST STEP