

Customer Outreach Executive – Telephone Customer and Business Support – (Non-Sales)

Kinherit – www.kinherit.co.uk

Kinherit is a high growth business, operating in the area of End-of-Life planning through writing Wills and Trusts. We are a market-disrupting Law Firm; our qualified estate planners help customers make sense of a whole range of legal and financial issues. Your role will be calling our customers, at the start and end of their Estate Planning journey.

Experience / Qualifications

Required

- Minimum of 2 years telephone experience, 5 years advantageous
- Confidence in speaking to customers over the telephone and video is critical
- Comfortable with speaking with a diverse range of customers including high-net-worth individuals

Desirable

- Experience in medical, legal, financial, or professional services
- Experience working in an office environment
- Experience providing customers with outstanding service
- Account management experience (but not essential)

Attributes

- Excellent verbal communication skills, and ability to engage with customers via telephone and video (on occasion)
- Ability to analyse the needs of customers following a script with the flexibility to suit the situation
- Excellent attention to detail, both verbal and written, to ensure communication accuracy
- Able to manage and liaise with multiple customers, estate planners and introducers at different stages on different tasks
- Ability to handle sensitive information with the utmost discretion
- Ability to work as a team and independently
- Ability to use Microsoft Word, Excel, and other IT systems and quick to pick up new systems

Package

- Competitive salary
- 25 days holiday plus 24&31 December and statutory bank holidays
- Pension
- Working hours – 37.5 hours per week (part-time is possible)
- Complimentary Will and End-of-Life planning
- Up to 30% discount for immediate family Wills and End-of-Life planning

Business summary

Our mission is to 'Redefine End-of-Life Planning'.

Our qualified estate planners help make sense of a whole range of legal and financial issues, creating a Will that makes sure our customers wealth, where possible, goes exactly where they want it to. We'll then set them up to record their plans in a secure online space – their own personal Kinvault® – which is easy and instant to update anytime and simple to share and execute when they die. With Kinherit our customers can be confident that when they die whatever they want to happen will happen – with no assets or information missed and without their family having to pay or do anything extra.

Our principal strategy is to find customers via professional introducers – in particular, wealth managers and independent financial advisors.

Role summary

This role suits experienced and confident telephone-based executives. This is not a call centre, not a sales role and is not high volume. To be successful in this role your professional and friendly approach is critical, with high-quality outcomes from every interaction.

Your role will be calling our customers, at the start and end of their Estate Planning journey. Firstly, you will call potential customers who are introduced to us by our extensive professional network, to book them an appointment with our Estate Planning team. This is the first connection with our customers and rapport building is critical. At the end of the customer journey, you will contact the customers again to support them in uploading their completed plans to their own personal Kinvault® plus calling their friends and family to introduce us, and inform them of what should happen, when the time comes.

Role description

As a Kinherit, Customer Outreach Executive your role is to telephone potential customers that have been introduced to us by their trusted financial advisors. You will initially introduce

Kinherit and gain confirmation that the customers have a need or a want for Estate Planning. You will then, with the use of the Kinherit portal, book the customers an appointment with their dedicated Estate Planner. Following the call your notes are critical in informing the Estate Planner, ensuring they have all the basic information required for them to conduct the advisor led call.

After the Estate Planner has completed the customers plans, your role is to speak with the customers again, this is to support them with our revolutionary handover service and using our Kinvault®. You will explain how to add the documents and details into their own personal Kinvault®. Lastly, you will contact the friends and family of our customers, explaining who we are and how to contact us when the customers die or become incapacitated.

As you grow into this role, you may be required to be involved in other telephone-based projects, either with customers or our professional introducer network. Although currently, this is not the core basis of your role.