HEALTHCARE MANAGEMENT TRUST

Unit 1 Langdon House, Langdon Road, Swansea SA1 8QY
Telephone: 020 7222 1177 Email: admin@hmt-uk.org
www.hmt-uk.org

Job Title	Sales Advisor
Department	Customer Experience Team
Reports to (job title)	Customer Experience Team Leader
Direct and Indirect Reports	No
Job Grade	A
Working Pattern	Rota-based shifts across Contact Centre operating hours of 8:00am to 7:00pm, Monday to Friday. Saturday mornings in line with service demand.

Who we are

At the Healthcare Management Trust, we are obsessed with achieving our **Vision**, "*to be the most innovative and best quality provider of niche health and social care services.*"

Our **Purpose** is, *to make every contact count, ensuring every resident and patient receives the best possible experience and outcome.*

We aim to provide services which value collaboration and place our residents, patients and people at the heart of all we do. We will always do the right thing for our residents, patients and people.

We will be outwardly connected to the most innovative practices and service offerings in the market. We will do things differently and will be bold with our ambition to change things for the better.

We are passionate about what we do and so are our people. Bringing their most authentic selves to work and seeking joy and fun in what we do.

We will deliver care and clinical interactions compassionately and tailor them to individual needs."

We achieve this by living our business **Values** every day:

- We are **caring**
- We are **enterprising**
- We are **resourceful**
- We are **authentic**
- We are **accountable**

As a result, we are able to give back to the people and communities we serve by delivering on our **Charitable Mission** to, *"Provide quality and innovative care solutions to those with complex needs within marginalized community settings."*

Date Choose an item.

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What you'll be doing (your job purpose)

As our Sales Advisor, you will be personally accountable for converting qualified Self-Pay enquiries into confirmed appointments and bookings across HMT hospitals, delivering agreed sales volumes, conversion rates and attributable revenue targets.

This is a target-led sales role, rather than a general customer experience role. You will own an allocated sales pipeline from initial enquiry through qualification, quotation, objection handling, proactive follow-up and closing, progressing post-consultation opportunities where authorised and clinically appropriate.

Success will be measured primarily through individual sales results and independently checked sales quality: confirmed bookings, enquiry-to-booking conversion, attributable revenue, follow-up completion, booking accuracy and compliance with approved sales processes. The role will include a basic salary plus performance-related pay for achieving agreed KPIs and sales targets, subject to the approved incentive scheme and its minimum quality requirements.

Every conversation must be clear, patient-led and professional. You will not provide clinical advice or promise clinical outcomes, suitability, insurer cover, availability or costs beyond the information confirmed through approved sources.

Your key accountabilities and responsibilities

- You will be accountable for achieving individual booking, conversion and revenue targets, contributing to team sales while maintaining agreed quality standards.
- You will own your allocated sales pipeline from initial enquiry to confirmed booking or agreed handover, including lead qualification, objection handling and timely follow-up of sales opportunities.
- You will be responsible for accurate, skilled communication of HMT services, approved prices, booking terms and Self-Pay and PMI requirements, supporting informed decisions without pressure, unapproved discounts or assumptions about insurance cover.
- You will be accountable for booking accuracy, complete and reliable CRM records, and compliance with call-quality, audit and secure payment standards.
- You will work with hospital teams, consultants and booking colleagues to resolve barriers to conversion, retaining commercial ownership until handover is confirmed.
- You will be responsible for understanding your sales performance, addressing conversion gaps and pipeline risks, and maintaining current sales, service and funding knowledge through coaching and development.
- You will uphold ethical sales and clinical boundaries, respect decisions not to proceed, and ensure appropriate escalation of clinical queries, safeguarding concerns, complaints and

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uncertain information, without recommending treatment or promising clinical outcomes, suitability or unconfirmed availability.

- You will be accountable for accurate, evidence-based sales and incentive reporting, with cancellations, refunds, duplicates and attribution errors reflected so that only validated, eligible sales count towards performance-related pay.

Your knowledge, skills and experience	
Demonstrable experience in a target-led telephone, contact centre or consultative sales role, with personal responsibility for converting leads into confirmed sales.	Essential
Evidence of achieving individual sales, conversion or revenue targets while meeting defined quality and compliance standards.	Essential
Strong sales communication skills: qualifying requirements, presenting service benefits, explaining prices and funding accurately, handling objections and securing an appropriate booking.	Essential
Experience managing a personal sales pipeline, conducting structured outbound follow-up, prioritising opportunities and recording clear reasons for lost sales.	Essential
Confident using CRM and Microsoft 365 to maintain accurate sales records, interpret KPI dashboards and reconcile booking outcomes; able to learn patient administration systems.	Essential
Experience selling private healthcare services or working in another regulated sales environment, including knowledge of Self-Pay and PMI processes.	Desirable

Your training and qualifications	
Minimum of GCSE English and Mathematics	Essential
NVQ/BTEC or equivalent qualification in Sales, Business or Contact Centre Operations; training in consultative selling, objection handling or closing.	Desirable
Training in information governance / data protection	Desirable

Aptitude and Abilities	
Results-driven and numerate, able to explain personal target attainment, conversion rates and pipeline performance, and take corrective action when sales fall behind plan.	Essential

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Able to prioritise a live sales pipeline, maintain a disciplined contact schedule and progress opportunities to a confirmed booking or clearly recorded outcome.	Essential
Confident qualifying leads, identifying buying barriers, handling objections and asking for a sale without pressure or inappropriate promises.	Essential
Able to maintain booking and data accuracy at pace, apply sales-quality checklists and recognise when a clinical, funding or compliance query requires escalation.	Essential

Disposition / Attitude / Motivation	
Commercially focused and motivated by achieving and exceeding individual sales targets and earning performance-related pay through high-quality, compliant sales.	Essential
Committed to ethical selling, accurate information and informed purchasing decisions; never prioritises a sales target or incentive over clinical boundaries or an individual's decision not to proceed.	Essential
Persistent, resilient and disciplined in pursuing warm sales opportunities, responding constructively to rejection, audit feedback and sales coaching.	Essential
Accurate and honest when discussing services, prices, funding routes and appointment options; willing to ask for help when information is unclear.	Essential
Accountable, collaborative and committed to HMT's values, confidentiality and the careful handling of sensitive information.	Essential

The way we do things at HMT (our Behaviours)
**See Appendix 1 attached*

Note: *This job description is an outline of the job, setting out general responsibilities and tasks the job holder may be required to undertake. It is not an entire reflection of the role and you may be required to carry out other duties and responsibilities from time to time. The job description will also be subject to change in-line with the needs of the business.*

Team members will be expected to carry out their duties in line with their terms and conditions and contract of employment, the standards stated in the employee handbook and Health & Safety guidelines and will be required to follow HMT policies and procedures.

We require that mandatory training is current and will expect you to participate and undertake further developmental training specific to the role.

I have received a copy of this Job Description; read it, understood it and agreed to it.

Signed..... Date.....

Job Holder

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