



"Immediate requirement"

Telecaller / Back Office Executive – Insurance Broking

Company: First Advisor Insurance Brokers Pvt. Ltd.

Job Location: Office No. 410, A Wing, Express Zone Building, Western Express Highway, Malad East, Mumbai

Nearest Railway Station: Goregaon

Industry: Insurance Broking / Financial Services

Job Type: Full-time

Department: Sales Support / Customer Service / Back Office

About the Company

First Advisor Insurance Brokers Pvt. Ltd. is an insurance broking company providing a wide range of insurance solutions, including Health Insurance, Motor Insurance, Term Insurance, Travel Insurance, Business Insurance, Family Insurance, Home Insurance, and various corporate and commercial insurance products.

We are looking for an **energetic, confident, and customer-focused Telecaller / Back Office Executive** to handle customer calls, lead follow-ups, data entry, documentation, and coordination with our Sales and Operations teams.

Job Summary

The selected candidate will be responsible for making outbound calls to prospective and existing customers, explaining insurance products and services, following up on leads and pending requirements, maintaining customer records, and coordinating with the internal Sales and Operations teams.

The ideal candidate should have **good communication skills, professional telephone etiquette, basic computer knowledge, and a positive attitude toward customers.**

Key Responsibilities

Telecalling & Customer Handling

- Make outbound calls to prospective and existing customers.
- Contact customers and prospective clients regarding insurance products and services.
- Explain basic insurance products, benefits, and available solutions to customers.
- Handle incoming customer calls and respond to basic queries professionally.
- Understand customer requirements and forward qualified leads to the Sales team.
- Maintain professional telephone etiquette and customer communication.
- Build a positive relationship with customers through regular communication.

Lead Follow-up & Customer Coordination

- Follow up regularly with leads and prospective customers.
- Follow up on quotations, proposals, documents, renewals, and pending requirements.
- Maintain proper follow-up schedules for all assigned leads.
- Coordinate with the Sales team for lead conversion and customer requirements.
- Coordinate with the Operations team for policy-related documentation and processing.
- Schedule customer appointments and meetings whenever required.
- Ensure timely follow-up with customers and avoid pending enquiries.

Back Office & Data Management

- Maintain customer and lead records in **MS Excel / CRM**.
- Perform accurate data entry and regularly update customer information.
- Update lead status, call remarks, follow-up dates, customer requirements, and conversion status.
- Maintain customer files, documents, quotations, proposals, and other office records.
- Ensure proper documentation and accurate record keeping.
- Prepare daily and weekly calling and follow-up reports.

Reporting & Office Coordination

- Submit daily calling and follow-up reports to the reporting manager.
- Maintain accurate records of calls, leads, follow-ups, appointments, and conversions.
- Coordinate with Sales, Operations, Accounts, and other departments whenever required.
- Support the Sales team with customer information and follow-up activities.
- Perform other back-office, administrative, and coordination activities assigned by management.

Insurance Products

The candidate will receive basic product training and may be required to communicate with customers regarding:

- Health Insurance
- Motor Insurance – Car & Two-Wheeler
- Term Insurance
- Travel Insurance
- Family Insurance
- Home Insurance
- Business Insurance
- Corporate Insurance
- Commercial Insurance
- Other General Insurance Products

Candidate Profile

We are looking for candidates who are:

- Confident and comfortable speaking with customers over the telephone.
- Good in verbal communication and customer handling.
- Polite, professional, and positive in their approach.
- Comfortable with regular calling and customer follow-ups.
- Able to maintain accurate records and documentation.
- Responsible, punctual, and disciplined.
- Comfortable working with daily activity targets and follow-up requirements.
- Able to handle multiple tasks efficiently.
- Willing to learn insurance products and processes.
- Interested in building a long-term career in the insurance industry.

Eligibility & Experience

- **12th Pass or Graduate** in any discipline.
- **Freshers can apply.**
- 0–3 years of experience in telecalling, customer service, back office, sales support, lead follow-up, or insurance will be preferred.
- Candidates with experience in an **insurance company or insurance broking company** will be given preference.
- Experience in telecalling, customer handling, lead management, CRM, or sales support will be an added advantage.

Required Skills

- Telecalling
- Customer Handling
- Lead Follow-up
- Lead Management
- Good Communication Skills
- Telephone Etiquette
- Customer Relationship Management
- Data Entry
- MS Excel
- MS Word
- Email & Internet
- Documentation
- CRM / Lead Management
- Team Coordination
- Basic Computer Knowledge
- Time Management
- Follow-up Skills

Compensation & Benefits

- **Salary:** As per experience, qualification, and market standards.

- Performance-based incentives may be applicable.
- Training and support on insurance products and processes.
- Opportunity to work with multiple insurance products and insurance companies.
- Career growth opportunities in the insurance broking and financial services industry.
- Performance-based growth opportunities.

Important Note

This is a **Telecalling and Back Office position** involving regular customer calling, lead follow-up, customer coordination, data entry, documentation, and sales support activities.

The candidate should be comfortable making **outbound calls, handling customer queries, maintaining records, and following up with customers regularly.**

Candidates having prior experience in **insurance telecalling, insurance broking, insurance sales support, customer service, lead generation, or back-office operations** will be given preference.

How to Apply

Interested candidates can send their resume on hrrfirst@firstadvisorsinsurance.com

Contact Person: Dattatray Telore – HR Manager

First Advisor Insurance Brokers Pvt. Ltd.