

Stephen Phillips BA FCII

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“Hands on” financial services marketing professional with 13 years Senior Management experience, offering particular strengths in strategic planning, innovative product development, marketing communications and systems project management.

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| <p>Core skills: Good communicator – track record of high audience understanding and extensive experience in written communication. High profile in UK IFA sector – Regular trade press contributor. Effective team builder – costs significantly reduced as proportion of sales. Numerate and computer literate – good record of interpreting complex data. Broadly based financial services knowledge – Chartered Insurer. Good understanding of electronic trading – launched Internet sites and undertaken major reviews for clients.</p> |
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Career:

Jan. 2001 – September 2001: Sales & Marketing Director, Open Door Finance

Invited by Mark Boleat (former Director General of the Association of British Insurers) to join the board of a new Internet Company, promoting a mortgage administration service to Mortgage Brokers. Worked part time on the project, in order to build and manage a salesforce and manage marketing activities.

Key achievements:

- Created Sales and Marketing plan to meet business objectives previously set by board.
- Recruited and trained sales force to implement sales plan.

Company ceased trading due to systems problems.

July 1998 - date: Director, The Insurance Marketing Department Limited

Established business offering marketing expertise to insurance and financial service product providers, and professional practices on a project-by-project basis. Also created Internet-based marketing information Website for IFAs.

Key achievements:

- Internet strategy review and implementation: Major insurance company; industry trade body; IFAs – plus own Website www.marketingdepartment.co.uk
- General projects: Creating marketing plans (IFAs and Institutions); managing seminar programmes; producing newsletters and mailshots; ghostwriting articles.
- Research: Use of Internet for direct distribution; Stakeholder pensions; Market issues.
- Presentations: Writing and managing major series of presentations to IFAs for life office.
- Author: IFA Guide to Marketing (Published by IFA Portfolio) now in second edition; various articles on marketing for intermediaries; series of sales articles for Selling Financial Services; consumer articles for IFAs' Websites.
- Main platform speaker at Institute of Insurance Brokers' national conference, 1999.
- Created insurance broker training Website, following launch of GISC.
- Marketing strategy and implementation for Third Party Service Provider.

1989 - July 1998: Marketing Manager, National Mutual

Reporting to Board level, directly responsible for all marketing and PR activities, including strategic marketing plans, product development, product marketing, advertising, sales support, exhibitions, events and media and public relations. Controlling 16 staff and a £2.5 million budget.

Key achievements:

- Provided strategic and operational support for company programmes, which generated premium income growth from £12 million in 1989, to £72 million in 1997.
- Introduced innovative product features and new funds and first income withdrawal facility in IFA Sector, producing more than £400 million new business.
- Actively involved in key account relationship management, working closely with several leading networks.
- Achieved high levels of positive comment in trade and consumer press.
- Initiated and managed corporate events.
- Regular contributor to trade press on industry and marketing issues.
- Member of Customer Care Steering Committee, overseeing process improvements.
- Chairman of Branch Disaster Recovery committee.
- Managed several large systems projects.

1970 - 1989: Commercial Union

Progressed through various underwriting and administration roles including 11 years in sales, leading to two years as Risk Management Consultant and three years in Marketing.

Key achievements:

- Achieved challenging personal sales targets (life, pensions and general insurance).
- Organised reinsurance arrangements for multinational insurance programme including fire, theft and consequential loss risks.
- Undertook Risk Management studies resulting in reassessment of fire and consequential loss arrangements for overseas utilities, comparing UK with South American policy wordings.
- Launched personal pension and group personal pension plans following introduction of new legislation in 1986.
- Undertook many successful direct marketing campaigns, including cross selling life products to non-life customers of Commercial Union and to clients of independent intermediaries.

Qualifications: FCII (1980)
BA - Humanities, Open University (1986)

Author: UK chapter of Annuities Around the World - LIMRA Inc. (USA); IFA Association Guide to Marketing; numerous trade press articles on pensions and marketing issues; regular contributor to Selling Professional Services on sales development issues.

Personal: British national; age 51 (DOB: 15/8/51); married (2 adult daughters living away from home). Hobbies include: reading; creative writing; music; architecture choral singing; walking; cooking and eating.

Memberships: Institute of Directors, London.
Chartered Insurance Institute – Past President,
Insurance Institute of Northampton (2001/2).

Stephen Phillips
15 August 2002

