

Job Specification



Account Executive

Reporting to: Relevant Director/Manager/Head of

Key Purpose

To deliver sales and renewal income targets through effective sales and relationship management techniques. Conducting effective client review meetings with existing and new clients to maximise business opportunities supporting the business strategy.

Responsibilities

- Achieve individual and team targets as set and agreed
- Identification of new prospects, decision makers and renewal dates, using our prospect database and own research being proactive to outbound call and run individual regional campaigns
- Handling, and potential reorganisation, of new leads and client meetings
- Maintain a comprehensive diary system and activity log to manage day to day income generation
- Provide professional support and advice to customers through review ensuring high levels of service making sure clients' needs are met and expectations are exceeded maximising cross sell opportunities at all times
- Ongoing focus on relationship management with existing key clients through client review meetings and other forms of communication
- SMART and effective management of time and resource to maximise opportunity to visit all relevant clients in a cost effective way including mid-term client meetings
- Work in partnership with all colleagues in the commercial development team as required to maximise opportunities
- Presentation in partnership with all colleagues in the commercial development team as required to maximise opportunities
- Where appropriate, provide a comprehensive search of the market to ensure a competitive quotation is offered in accordance with the customers' needs
- Underwrite scheme policies in line with underwriting authority levels and referral guidelines
- Work with Commercial Insurance Advisor to administer new business policies within company guidelines
- Ensure focused on collection of client money within company guidelines
- Maintain focused on collection of client money within company guidelines
- Maintain and develop own technical competence in line with client review focus

- Assist in the development of payment plans through cross selling, and assisting with new plan customers and the growth of existing plans
- To be professional when representing Lloyd & Whyte Ltd at external events, e.g. relevant conferences/events and customer visits
- Identify and research potential new markets, products, prospects and introducers
- Support colleagues from all areas of the business as required

Skills & Behaviours

- Demonstrate our values of Fun, Supportive, Professional, working in Partnership and Ambitious
- Confident and capable in communicating, managing relationships and building rapport with clients face to face to provide an excellent client experience
- Ability to provide holistic, advice based reviews and recommendations to clients
- Tenacious, positive and pro-active to new challenges and opportunities
- Motivated & enthusiastic towards meeting and exceeding targets
- Resourceful, organised and deadline driven with good time management and self-motivation
- Communicate effectively with other team members whilst working closely and flexibly
- Ability to work in a regulated, compliant and client focused environment
- Quality orientated with great attention to detail
- IT literate and analytical

Qualifications

- Chartered Insurance Institute Certificate in Insurance