

Account Executive Role and responsibilities

Background	<p>PolicyBee is a fast-growing, independent, professional insurance broker. Our business is founded on a specific set of values, underpinned by a clear overall vision.</p> <p>We operate in a busy and constantly changing sector of the business insurance market. To stay successful, we have to take note of what's going on around us, think on our feet and make changes when necessary.</p> <p>So, our team has to be proactive, innovative and creative as well as confident, communicative and very organised.</p> <p>Ultimately, we believe insurance should be done better. But we can't do it alone – we need the right people.</p> <p>That's where you come in.</p>
Job title	Account executive
Hours of work	37.5 hours per week – Monday to Friday, 9 to 5.30
Location	Ipswich
Reports to	Head of sales (in case of dispute – chairman)
Main purpose of the role	<p>An account executive is a valued and essential member of the team.</p> <p>You're on the frontline, dealing with customers and insurers on a daily basis. You'll be responsible for building and maintaining the firm's book of business, while ensuring our customers get the very best advice, products and service.</p> <p>Often, you'll be a new customer's first point of contact with us. That's a great opportunity to convey our values, build rapport and demonstrate how we're not like other brokers.</p> <p>Most people consider their insurance a chore. One that's fraught with confusing language and intimidating processes. Your skills and attitude will help convince them otherwise.</p>
Key responsibilities	<ul style="list-style-type: none"> • Dealing with customer enquiries by phone and email. • Ensure work is carried out promptly in line with our target service levels. • Understand customers' business needs and ensure that these are met in line with their risk profile. • Identify the future insurance needs of our customers. • Identify and act on opportunities to cross-sell and up-sell additional insurance products to both existing and new customers. • Explain products to customers in plain English. • Issue correct documents and quotations to customers. • Convert quotations to sales in line with our target conversion rate. • Understand the difference between simple and complex risks. • Record full and accurate risk notes. • Deal with any query if a colleague is absent for any reason. • Act as referral point for junior or less experienced members of the team. • Effectively negotiate with underwriters to obtain the best terms possible on new and renewal business. • Build rapport with customers and effectively negotiate new and renewal business. • Suggest effective development of relevant systems. • Handle claims competently. • Identify when a situation escalates and when matters should be referred to a senior member of staff. • Achieve the objectives set in your personal development review, within the time limit specified. • Prepare reports when necessary. • Organise and attend meetings. • Undertake all other duties as reasonably required.

Account Executive Role and responsibilities

<p>Additional responsibilities</p>	<p>PolicyBee is regulated and authorised by the Financial Services authority. You are required to:</p> <ul style="list-style-type: none"> • Follow PolicyBee procedures on conducting business. • Comply at all times with the requirements of FSA rules. • Be aware of the company's policies in respect of: <ul style="list-style-type: none"> ○ Treating customers fairly ○ Conflicts of interest
<p>Personal qualities</p>	<p>You will:</p> <ul style="list-style-type: none"> • Share the values of the company. • Have drive, self-motivation and determination to achieve results. • Communicate with customers in line with PolicyBee's tone of voice and style guide. • Be comfortable with technology. • Be adaptable and open-minded. • Use effective listening skills. • Be able to work to deadlines and manage your own time. • Be calm under pressure. • Have a positive, enthusiastic attitude. • Be a team player. • Be an ambassador for PolicyBee in and outside of work.
<p>Personal and professional development</p>	<p>We expect that you will become familiar with the insurance products we arrange, understand their benefits and how they relate to our customers.</p> <p>Particular focus should be placed on:</p> <p>Professional indemnity insurance Employers' and public liability insurance Management liability insurance Commercial property insurance Personal accident insurance Business travel insurance</p> <p>You will also:</p> <ul style="list-style-type: none"> • Study and attend training in order to further your technical expertise. • Develop your own continuing personal development plan (in consultation with your line manager).