

Account Executive Role Profile	
PolicyBee	<p>PolicyBee is a fast-growing, independent, online professional insurance broker. Our business is founded on a specific set of values, underpinned by a clear overall vision.</p> <p>That vision is to be the company of choice for the insurance needs of freelancers, sole traders and SMEs.</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>
Role title	Account Executive
Hours of work	37.5 hours per week - Monday to Friday (or part-time)
Location	Brightwell Barns, Ipswich
Salary	Negotiable
Reports to	Director of Customer Service, Kerri-Ann Hockley In case of dispute, Iain Hatfield
You	<p>An account executive is a valued and essential member of the broking 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 making sure our customers get the very best advice, products and service.</p> <p>You could 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>

About you	<p>You'll need to be:</p> <ul style="list-style-type: none">▪ A committed worker, diligent, showing initiative and having perseverance when a task is demanding.▪ A positive person. You'll focus on what's good and find joy in the simple things. You'll know that, while there are lots of things you can't directly control, you can control what you choose to focus on.▪ A team player, supportive, kind and warm to your fellow team mates. The team has a family feel – we're always there for each other. You'll be happy to chip in if and when other departments need help or support, too.▪ Able to show an adaptable side. Maybe a team member needs your support, or you're needed to help on a task, or a customer's business and needs are unusual in nature. We'd need you to be able to adjust and respond appropriately.▪ A quick learner. In this role you'll learn a lot about many different insurance products. You'll need a willingness to learn these products inside and out.▪ Able to work with integrity. We'll need you to have sound judgement, be dependable, and always do what's right by the customer first.▪ Able to show empathy. Even when you can't tell the customer exactly what they want to hear, a dose of care, concern, and understanding will go a long way.▪ Able to ask effective questions and listen actively – it's fundamental to selling/renewing insurance. Understanding our clients' needs and presenting them with the right cover for an affordable price should be all the persuading you'll need to do.▪ Able to communicate effectively. Our customers rely on clear information to understand their insurance, and we rely on it to build trust. You'll be able to explain in accurate, plain English what they need to know.▪ Able to use tech and understand digital. We're an online business so you'll need to know your way around a keyboard, understand buying online and not be phased by learning new systems and processes. <p>We want you to love working for us, love the job you have and the people you work with.</p>
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The teams	<p>We have 3 distinct teams of account executives. The new business team, existing business team and malpractice specialty team.</p> <p>The new business team manage calls to and from prospective new clients. You'll need to be able to discuss and understand the customer's business needs and make sure these are met. Each customer is a little different – from industry type to specific role.</p> <p>You'll either use an internal quoting system where we can bind insurance under delegated authority or approach underwriters to quote.</p> <p>Selling over the phone is part of the role. We don't have individual sales targets; performance isn't judged by your ability to sell. A customer's needs come first.</p> <p>You'd be expected to convert quotes to sales thanks to the extensive options available to use when quoting. This ensures you're able to give the prospective customer the best options.</p> <p>Once you've sold a policy you'll be required to bind with the insurer and issue the policy documents. We'd expect you to be comfortable dealing with any customer query.</p> <p>The customer care team manages customer queries, mid-term changes and renewals. Many of our customers have continuing policies where renewal is automatic unless they say otherwise.</p> <p>This isn't the case with some risks and you'll have to approach underwriters, negotiate terms, present and explain these to the customer and renew the business. This could mean an element of selling, in a similar way to that required of a new business team member.</p> <p>The malpractice specialty team manage both new and existing customers that operate in the beauty/aesthetics industry. Within this team you'll gain expert knowledge of the target market, the treatments and activities provided by these individuals, the client's needs and key risks, and ensure that we provide them with the most appropriate insurance products.</p>
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<p>Support in the role</p>	<p>You'll have a phone with your own direct line. It's how we do business with our customers. We're an online broker so we don't visit clients. Our website generates the leads, we won't be asking you to do any cold calling. Our customers are freelancers, sole traders, consultants, contractors, and small businesses across the UK.</p> <p>Our telephone system links to our customer database so, when a call comes in, a pop up tells you who's calling. You're then one click away from their file to scan and see why they might be calling.</p> <p>You'll have your own PolicyBee email address. Phone and email form the foundations of our communications with customers. We issue insurance quotes and policy documents via email. Much of our correspondence with clients is via email. You'll need to manage your mailbox and respond promptly to client emails. Crucial to this is our brand 'voice' – it's what sets us apart from our competitors. You'll have training, and access to supporting guides, to understand our brand and have the confidence to communicate as PolicyBee.</p> <p>We developed our IT systems in-house so they're highly customised to help you do your job effectively. Your working day is organized in a workflow with 'actions' on individual customer files.</p>
<p>Insurance</p>	<p>To be able to give our clients the right advice, discuss their insurance with confidence and help less experienced members of the team, you'll need to already have knowledge of, or quickly become familiar with our product range. Essentially, this is to understand the benefits of the insurance and how it relates to our customers.</p> <p>We predominately sell professional indemnity and/or malpractice insurance. Previous experience working with either of this insurance and/or our client type of freelancers, sole traders and small limited companies is ideal but not essential.</p> <p>We also provide a variety of other insurance such as: public liability, employers' liability, office insurance, personal accident, directors and officers, trustees' liability (small charities primarily), and cyber.</p>
<p>FCA Compliance Responsibilities</p>	<p>PolicyBee's business activities are regulated by the Financial Conduct Authority (FCA).</p> <p>As a team member, you're required to:</p> <ul style="list-style-type: none"> • Be aware of the importance of FCA compliance in respect of your activities • Comply at all times with the requirements of FCA rules and be aware of the company's policies in respect of Treating Customers Fairly.
	<p>This role description is a guide to the work you may be required to undertake but does not form part of your contract of employment. It may change from time to time to reflect changing circumstances.</p>