

CRISPIN SPEERS AND PARTNERS LIMITED

JOB DESCRIPTION

Job Title:	Account Executive
Reports to:	Employee Benefits Manager
Business Unit:	Employee Benefits Division

Job Purpose:	<p>Crispin Speers and Partners Ltd (CSP) is a leading wholesale Lloyd's insurance and reinsurance broker providing tailor-made solutions for UK and International clients.</p> <p>This role provides key client relationship management to maintain and strengthen relationships with existing clients on renewal and new business. Our usual classes are travel, personal accident and gadget but we may look to expand into other classes. Clients can be direct and through both employee benefit consultants and brokers who in turn own the relationships with their clients.</p>
Key tasks:	<ul style="list-style-type: none"> • Maintain and strengthen relationships with existing clients and consultants. Regular calls and meetings to discuss and assess their needs and requirements. • Develop new business opportunities with clients and consultants, • Preparation of presentations, tenders and quotations for preferred provider status or single risk propositions. • Prepare client documentation for internal approval typically under Binding Authorities and issuance to client. • Provide client support during full risk cycle (including mid-term changes and renewal). • Produce reports and review MI to monitor client's growth and overall performance. • Communicate with Insurers and third party suppliers such as claims handlers and assistance companies. • Preparation of renewal presentations (including premium and claim statistics), agreement with clients and finalisation with underwriters. • Host virtual benefit fairs and webinars and attend benefit fairs when required (this may involve travel within the UK/ Ireland). • Develop market presence and possible new market opportunities. • Attend conferences, events and networking opportunities. • Keep abreast of competitor and market trends to ensure we are competitive and aligned in the EB & A&H arena.
Key Results Areas:	<ul style="list-style-type: none"> • Achieve unit income targets. • Proactively grow the portfolio of EB clients. • Meet clients' insurance requirements and those of Insurers and other parties in a professional and timely manner. • Manage client renewals, including renewal documentation, renewal quotations and accounting procedures ensuring company

	<p>and FCA requirements are met.</p> <ul style="list-style-type: none"> • Accurate input of data onto the company office systems and generation of reports. • Meet CPD requirements.
Skills and competencies:	<ul style="list-style-type: none"> • Customer service focused with strong influencing and negotiation skills, and high levels of commercial acumen. • High level interpersonal skills with the ability to build successful, mutually beneficial business relationships. • Well developed relationship management skills and the ability to communicate effectively and professionally with people with various levels of knowledge face to face, over the telephone and in writing. • Communication skills: written, oral and presentational. • Planning, organisational and time management skills. • Understand certificate and wording requirements in accordance with Binding Authority terms and conditions. • Problem solving. • Well developed computer literacy in Microsoft Word, Excel, Power Point and Outlook. Knowledge of SSP Sector would be desirable but not essential as training will be provided. • Ability to adhere to and implement relevant company policies.
Desirable knowledge and experience:	<ul style="list-style-type: none"> • Proven track record understanding of Personal Lines Insurance, preferably including travel, personal accident and gadget Insurance. • Awareness and understanding of the UK Employee Benefits Market or Accident Health Life and Specialty. • FCA compliance requirements. • Proven experience within a similar role. • Sound understanding and working knowledge of Insurance, including experience of travel and/or personal accident and other allied classes such as Accident Health Life and Speciality Insurance. • Experience within the insurance broking industry and knowledge of business processes within the London Market would be a distinct advantage. • CII qualified or working towards this.
Other:	<ul style="list-style-type: none"> • Any other duties requested by senior management to fulfil the Job Purpose.