

## CRISPIN SPEERS AND PARTNERS LIMITED

### JOB DESCRIPTION

<b>Job Title:</b>	Account Executive
<b>Reports to:</b>	Manager, Corporate Accident & Health Products
<b>Business Unit:</b>	CSP Underwriting

Job Purpose:	<p>Crispin Speers &amp; Partners Ltd (CSP) is a leading niche Lloyd's insurance and reinsurance broker providing tailor-made solutions for UK and International clients. It operates in 3 key areas:</p> <ul style="list-style-type: none"> <li>• CSP Underwriting – in house delegated authorities granted by Insurers</li> <li>• CSP Broking – placement of risk and programs for clients</li> <li>• CSP Management Services – incubator for intermediaries</li> </ul> <p>This role is responsible for providing support and leadership within the team along with key client management to maintain and strengthen relationships with existing clients as well as developing new opportunities. Whilst the principal classes of business are travel and personal accident, an ability and willingness to work with cross function teams to build relationships and maximise opportunities, for the business, is important.</p> <p>This role will also require close work within CSP Underwriting including its Employee Benefit team, which delivers Flexible Benefit solutions through salary sacrifice. Both teams work closely with a variety of Employee Benefit Consultants, Brokers and their clients. Fostering a combined team approach and culture are imperative.</p>
Key tasks:	<ul style="list-style-type: none"> <li>• Establish, maintain and strengthen good working relationships with clients, including identified key clients. These include a cross section of all the major Employee Benefit Consultants in the UK, along with associated Brokers and then the ultimate Corporate Clients.</li> <li>• Work within the team and leadership to contribute and lead projects and initiatives, where necessary.</li> <li>• Working with key introducers to identify, pursue and convert new business opportunities.</li> <li>• Meet clients, existing and new, on a structured basis with feedback and reports on needs, requirements, and opportunities through "knowing your client".</li> <li>• Manage client expectations by handling and responding to queries quickly and effectively.</li> <li>• Assist in the development of specific and designated products and services within the team, including implementation of technology to drive efficiency and service.</li> <li>• Planning, preparation and delivery of presentations.</li> <li>• Preparation of information and management information for presentation internally, for underwriters, and clients.</li> <li>• Attend benefit fairs/webinars/client meetings when required (this may involve travel within the UK/ Ireland).</li> </ul>

	<ul style="list-style-type: none"> <li>• Attend conferences, events and networking opportunities.</li> <li>• Keep abreast of competitor and market trends to ensure we are competitive and aligned in the Employee Benefit &amp; A&amp;H arenas.</li> <li>• Work with the team to ensure quotations, adjustments and renewals are dealt with swiftly, efficiently and in accordance with company procedures.</li> <li>• Internal liaison with other departments i.e. Compliance, Technical and Accounts as required; cross referring opportunities where they arise.</li> </ul>
Key Results Areas:	<ul style="list-style-type: none"> <li>• Contribute towards business income targets.</li> <li>• Proactively maximise existing and new client opportunities.</li> <li>• Meet clients' requirements and those of insurers and other parties in a professional and timely manner.</li> <li>• Manage client renewals, including renewal documentation, renewal quotations and accounting procedures ensuring company and FCA requirements are adhered to.</li> <li>• Accurate input of data onto the company systems.</li> <li>• Meet CPD requirements.</li> </ul>
Skills and competencies:	<ul style="list-style-type: none"> <li>• Highly customer focused with strong influencing and negotiation skills, and high levels of commercial acumen.</li> <li>• Strong interpersonal skills with the ability to build successful, mutually beneficial, business relationships.</li> <li>• Well-developed relationship management skills and the ability to communicate effectively and professionally across various levels of knowledge.</li> <li>• Good planning, organisational and time management.</li> <li>• Understand certificate and wording requirements in accordance with Binding Authority terms and conditions.</li> <li>• Ability to prepare and present data and considerations.</li> <li>• Self-motivated and a good team player.</li> <li>• Identifies clients' needs and optimises cross selling opportunities where they arise.</li> <li>• Strong numeracy capabilities.</li> <li>• A proven problem solver.</li> <li>• Well-developed computer literacy in Microsoft Word, Excel, Power Point and Outlook.</li> <li>• Ability to adhere to and implement relevant company policies.</li> </ul>
Knowledge and experience desired:	<ul style="list-style-type: none"> <li>• Experience of employee benefits insurance, preferably including travel and personal accident.</li> <li>• Experience of the Accident &amp; Health Life and Specialty market.</li> <li>• Working knowledge of FCA compliance requirements.</li> <li>• Proven experience within or working towards a similar role.</li> <li>• Understanding and knowledge of Insurance, including experience of travel and/or personal accident and other allied classes.</li> <li>• Experience within the insurance broking industry and knowledge of business processes within the London Market would be an advantage.</li> </ul>
Other:	<ul style="list-style-type: none"> <li>• Any other duties reasonably requested by management to fulfil the Job purpose.</li> </ul>