



JOB DESCRIPTION – COX MAHON – ACCOUNT EXECUTIVE (LONDON AREA)

JOB TITLE	ACCOUNT EXECUTIVE	LOCATION	ST JAMES PLACE LONDON
REPORTS TO	BOARD OF DIRECTORS	DATE WRITTEN	1/8/22

PURPOSE OF ROLE

The Account Executive's key role is to build a book of business across the UK professions market, in line with targets, whilst maintaining the existing book of business.

To provide a key interface with Underwriters in the London market.

KEY STAKEHOLDERS

- Senior Managers
- Account Handlers/Claims
- Clients
- Underwriters/Insurers

KEY RESPONSIBILITIES

GROWING THE BUSINESS

- Monitor and report on products in the marketplace to identify product weaknesses and opportunities for product development.
- Identify and advise on opportunities to cross sell to maximise income, retain business though offering a complete solution and minimise Errors & Omissions exposure
- Actively promote 'Cox Mahon', both internally and externally, and safeguard the reputation of the business. .

DELIVERING TARGETS

- Deliver as part of the team to agreed client service requirements.
- Establish and advise on client requirements and initiate quotes for new business.
- Identify and advise on opportunities to cross sell to existing CM clients to maximise income.
- Retain business though offering a complete solution and minimise Errors & Omissions exposure.
- Uncover new ways of sourcing high value business partners to grow the book of business.



ACCOUNT MANAGEMENT

- Establish and advise on client requirements and initiate quotes for new business.
- Process and administer new business premiums in accordance with policies and procedure and report on pipeline income to ensure accurate reporting of performance against targets.
- Undertake all technical and day to day account handling requirements to provide the necessary service to client accounts.
- Report on pipeline income to ensure accurate reporting of performance against targets.
- Structure and provide technical input for insurer presentations and other insurer documentation for the broking and placement of risks.
- Prepare correspondence, documentation, and other communication for issue to clients and other client representatives as necessary.
- Create and maintain contemporaneous records of communication with clients and insurers.
- Liaise with and provide technical advice and input to external client service teams to ensure the needs of the client are being met.
- Deliver insightful reporting of our performance to senior management and give visibility across the whole business.

HORIZON SCANNING

- Assessing the risks to the business of any new opportunities
- Maintaining an awareness of external factors (including competitors, market developments, government initiatives, current and proposed legislation) which impact the business
- Communicating such information and any subsequent changes to Senior Management
- Developing and maintaining an excellent understanding of customers/target audience to ensure that their needs are being met and that their business is retained.

COMPLIANCE RESPONSIBILITIES

- Ensure that all statutory and company regulations are followed to protect clients, colleagues, and the business interests of the company.
- Ensure that Conduct Rules are adhered to and followed.
- Actively seek to improve personal knowledge through Continued Professional Development

RELATIONSHIPS

- To build on and maintain relationships with insurers to maximise operational efficiencies and commission earnings.
- To identify and develop any new insurer relationships that will benefit this division of Cox Mahon.
- Support introduction of a specific measurement tool for Customer Satisfaction to ensure Customer journey expectations are achieved

To undertake all other duties as reasonably required and directed by the Board.



QUALIFICATIONS, SKILLS AND EXPERIENCE

- Previous commercial insurance industry experience.
- Qualified Cert CII or progression towards
- 5 GCSE's including Maths and English
- Detail oriented, excellent grammar and communication skills.
- Proficiency with Acturis preferred.
- A proven track record of the role, including evidence of retention and growth of an existing book of business as well as generating and converting new business opportunities to meet targets given.
- Experience in dealing with the commercial and/or consumer insurance market including an understanding of the e-trade marketplace.
- Have a good knowledge of the responsibilities surrounding compliance within this type of role.
- Good IT skills including Microsoft Office including good technical knowledge and presentation skills with the ability to present to groups of individuals
- Effective verbal, written and oral communication skills.
- Ability to work efficiently under pressure with excellent planning, organisational and time management skills.

SPECIFIC KEY TASKS & TARGETS

To be specified as appropriate, in advance of each Performance Review Period

HEALTH & SAFETY REQUIREMENTS

You will adhere to all company and legal health and safety standards

VALUES & BEHAVIOURS

You will adhere to and demonstrate the values and behaviours adopted by Cox Mahon Ltd