



Position Description

Position Title:	Account Executive
Team:	
Direct reports:	No direct reports
Reports to:	
Qualifications/ Experience:	<ul style="list-style-type: none">▪ Tier 1▪ Working towards Diploma of Insurance Broking▪ Obtain and retain qualifications as determined by legislation from time to time in order to provide advice to the public and comply with any financial services legislation and regulation enacted by the Commonwealth of Australia or the States▪ Equivalent corporate experience – typically at least 3 years + Insurance industry experience.
Technical skills:	<p>Technical Insurance/Broking skills in accordance with RG 146 requirements including:</p> <ul style="list-style-type: none">– insurance products– legislative obligations– claims processes and claims broking <p>Literacy in technology and systems in current use in the Insurance industry</p>
Job Purpose:	Supporting the company in achieving its strategic goals and growth by servicing a portfolio of accounts allocated by the Account Manager or senior staff member.
Main Activities:	<ul style="list-style-type: none">▪ With support of senior staff, assist with the management of the client relationships across the portfolio and understand your clients' specific requirements for insurance, their business objectives and strategy. Assisting with pursuing new business opportunities in conjunction with the team and senior staff member.▪ Assisting senior staff & team with the design, development, implementation, management, and coordination of insurance programs for clients.▪ With the support of senior staff, identifying and pursuing new business opportunities & build business relationships.▪ Management of client information in the company broking system and responsible for overseeing client invoices and payments.



- Gathering client information to support renewal documentation and provide assistance to Account Manager/Senior Ac Executive with delegated tasks.
- Following up and collecting client payments & invoicing. Maintaining the renewal tracker (if applicable) and ensuring that the policies due for renewal, client payments, insurer payments and unposted transactions lists are up to date and maintained in good order.

Assist with the preparation of premium calculations and options for premium funding.

- Assist with achieving team budget.
- Helping maintain positive and meaningful working relationships with Insurers and keep well-informed of the Insurance and Client markets.
- Maintaining strong compliance outcomes and a compliance culture.

Our Values:

Innovation - A fresh approach to risk

Trust - Putting people first

Excellence –Expertise without compromise

Behavioural Competencies:

Persuasiveness/Sales Ability

Developing and utilising suitable communication styles and techniques to gain acceptance of an idea, plan, activity, service or product from prospects and clients, demonstrating knowledge of the sales process.

Negotiation

Effectively exploring alternatives and positions to reach outcomes that gain all parties' support and acceptance. Presenting rational arguments, drawing on reason and logic in making a case; demonstrating that a course of action is of mutual benefit; focuses on the problem rather than the person in a negotiation.

Client Relationship Management

Identifying potential for and developing new client relationships; proactively identifying client requirements; undertaking actions which meet and/or exceed client expectations; using communication styles and methods to ensure understanding and enduring client satisfaction.

Communicating Ideas and Information

Clearly expressing ideas both on a one-to-one basis and in group situations (including non-verbal communication); expressing ideas effectively in written format that contain correct and appropriate syntax, grammar, language and terminology; adjusting language to suit the requirements of the recipients.

	<p>Teamwork/Team Membership</p> <p>Demonstrating the ability to work effectively in a team/work group or those outside the formal line of authority (e.g. peers, senior managers), not as a team leader but as a valued member who assists in building morale and makes extra effort to help the team reach organisational goals; taking actions that respect the needs and contributions of others; contributing to, accepting and promoting the consensus; subordinating own objectives to the objectives of the organisation or team.</p> <p>Influencing</p> <p>Using communication and interpersonal styles and methods to inspire and guide individuals (subordinates, colleagues and superiors) toward improved goal achievement; modifying behaviours to accommodate tasks, situations, and individuals involved; influencing factors outside line control to achieve goals.</p> <p>Quality Orientation/Thoroughness</p> <p>Showing concern for completeness and accuracy around tasks, information and project management. Accomplishing tasks with concern for all areas involved, no matter how small; maintaining watchfulness over a period of time. Discovering weaknesses or missing data and acting to correct.</p> <p>Keeping track of many details without forgetting items.</p>
<p>Authority</p>	<p>Duties to be referred to Compliance Manager</p> <p>Immediate reporting of any potential Professional Indemnity exposures to Gow-Gates.</p>