



Position Description

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| Position Title: | Account Manager |
| Team: | |
| Direct reports: | |
| Reports to: | |
| Qualifications/ Experience: | <ul style="list-style-type: none">▪ Tier 1 & Diploma of Insurance Broking▪ Tertiary qualifications in a business related discipline▪ 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 8-10 years Insurance experience with at least 3 years' experience managing client accounts at a senior level. |
| Technical skills: | <p>Technical Insurance/Broking skills in accordance with RG 146 requirements including:</p> <ul style="list-style-type: none">– insurance products– legislative and compliance obligations (retail clients/retail product)– claims processes and claims broking <p>Literacy in technology and systems in current use in the Insurance industry</p> |
| Job Purpose: | <p>Contribute to business growth objectives of Gow-Gates Insurance Brokers by development of new business and retention of existing business, specifically in nominated accounts within the nominated Broking division.</p> <p>Responsible for overseeing and maintaining a portfolio of clients and responsible for revenue and ensuring a high level of service across the team.</p> |
| Main Activities: | <ul style="list-style-type: none">▪ Manage the relationships across the client portfolio and understand your clients' specific requirements for insurance, their business objectives and strategy.▪ Ensure all client needs are identified and met by taking a pro-active approach to all aspects of account management and service delivery to clients including account retention and defence strategies. |

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| | <ul style="list-style-type: none"> ▪ Identifying and pursuing new business opportunities build business relationships. Actively develop additional business from existing portfolio in line with budget targets. ▪ Maintain positive and meaningful working relationships with Insurers and keep well-informed of the Insurance and Client markets. ▪ Manage the annual binder renewal process across all clients (where applicable). ▪ Regular face to face meetings with larger clients and frequent digital meetings in line with the client's expectation/preferences. Build close relationship with key day to day contacts and support company to develop relationships at senior levels. ▪ Lead, plan and implement clear and effective renewal and broking strategies. ▪ Provide clear direction and guidance of key activities to the team. Provide support through mentorship and training of junior staff within the team. ▪ Responsible for assisting with achieving team budget and meeting individual budget and contributing to overall business objectives. ▪ Be aware of all clients claims and oversee its progress where necessary. ▪ Maintain strong compliance outcomes and a compliance culture. ▪ Management of client info in the company broking system and responsible for overseeing client invoices and payments and prepare premium calculations and options for premium funding. ▪ Overall responsibility of debtor management and ensure all Financial related processes are adhered to across the portfolio. ▪ Overseeing the maintenance of 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. ▪ Ensure client aware of all Gow-Gates services and arrange introductions where appropriate. |
| Our Values: | <p>Innovation - A fresh approach to risk</p> <p>Trust - Putting people first</p> <p>Excellence –Expertise without compromise</p> |
| Behavioural Competencies: | <p>Persuasiveness/Sales Ability</p> <p>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.</p> <p>Negotiation</p> <p>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</p> |

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.

Building Business Relationships

Using interpersonal communication styles and methods to maximise partnerships with business associates (e.g. clients, suppliers, agents as well as other staff) to meet mutual business aims and objectives.

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.

Developing Performance

Developing the performance, competency and qualifications of team members by planning effective professional development activities related to current and future job requirements.

Teamwork/Team Membership

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.

Team Development

Using appropriate communication styles and techniques to develop esprit de corps and intra-team co-operation; managing disputes and conflict to the best possible solution; demonstrating awareness of the needs and the contributions of team members.

Influencing

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.

Delegation

Allocating task responsibilities and decision-making authority to appropriate team members, optimising their time, skills and potential for success.



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| | Quality Orientation/Thoroughness 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. Keeping track of many details without forgetting items. |
| Authority | Duties to be referred to Compliance Manager Immediate reporting of any potential Professional Indemnity exposures to Gow-Gates. |