


Senior Commercial Account Executive

Job Description

Role:	To deal with quotations generated by the marketing department, Online Lead Generation sites, taking details, auditing client's acceptability, pricing and closing the sale.
Location:	Redhill, Surrey (A minimum of two days in the office and the option to remote work for the rest of the week.)
Brand:	Plan Insurance Brokers 
Reporting to:	Commercial Manager
Contract type:	Permanent
Hours:	Full time (Monday to Friday – 8.55am to 5.30pm)

The Role

We have a fantastic opportunity for a hungry and positive new business account executive. The position is unique in the market place as 99% of new business leads are provided!

We are looking for someone with over eight years' commercial insurance experience and a solid working knowledge of general commercial insurances (hopefully a bias towards contractors' and construction). Motor fleet too would be an added bonus! We like our seniors to act as a point of reference and knowledge pool to help and assist the rest of the team when the Team Leaders and Manager are otherwise engaged.

You will be joining an existing team of friendly professionals that really do get on and care about the company they work for. The commercial team at Plan have some ambitious growth plans over the coming years so not only is this a great time to join but there will be plenty of opportunity for development for the right individuals.

Essential Skills

- Ability to recognise sales opportunities, create and develop a healthy mix of pipeline through a strategic and targeted approach.
- A strong work ethic with good organisational skills.
- Customer focused with a track record of consistently over achieving on targets.
- Achieve all individual sales KPI targets set by the company, whilst managing customer and team expectations.
- Ability to communicate with both customers and colleagues at all levels of seniority and liaise effectively with other internal departments and external insurers.
- Confident and able to conduct on site client visits/insurance reviews with a basic knowledge of Risk Management.
- Ability to work with minimal supervision.
- Proven desire to update product knowledge and skill set.
- Awareness of the Data Protection Act.
- Professional approach to all aspects of business both internally and externally.

Main Duties and Responsibilities:

- Provide quotations and sell policies to clients.
- Achieving the monthly sales targets.
- Assisting the team in completing objectives including monthly sales targets
- Day to day account handling and administration (New Business Only).

- Strong ability to deal with Target driven New Business Sales.
- Able to demonstrate a positive, enthusiastic, committed and flexible attitude towards customers and other team members, recognising the importance and benefits of effective team working.
- Deliver consistent customer service in line with 'best practice' and ensure compliance to relevant policies.
- Provide point of contact for customer enquiries, dealing with these through to a successful outcome.
- Actively follow company policies (including Data Protection, Health & Safety & Equal Opportunities).
- Attend staff meetings and training as required.
- Carry out any other duties within the scope, spirit and purpose of the job as requested by your Manager/Team Leader.
- Maintain complete and accurate records and computer files.
- Maintain professionalism and a good level of personal presentation.

About us

The Plan Group Ltd is a family owned, independent insurance intermediary delivering high-quality cover from market-leading insurers in niche commercial and personal lines insurance. We are listed in the UK's top 100 brokers, employ approximately 100 staff and write in excess of £25m Gross Written Premium. The business is built on long-term staff, customer and insurer relations. We pride ourselves on product and IT innovations to help drive growth.

Plan Insurance Brokers is an independent, market leading commercial insurance brokerage. We arrange high quality cover and provide intelligent insurance solutions to UK businesses and have done so for over 30 years.

We are a friendly company, offering real career progression and outstanding training and mentoring through our in-house dedicated team. A large number of our team leaders and managers have been with us for a long time, having started perhaps handling calls or as apprentices and flourished with the business.