



**Account Executive  
H&H Insurance Brokers Limited**

**Job Title: Account Executive – H&H Insurance Brokers**

**Reporting to: Associate Director, North Wales**

**Overall Job Purpose:**

To obtain new business and maintain the existing client base to enable H&H Insurance Brokers to become the chosen provider for insurance in our chosen geographic areas.

**Job Description**

**Primary Accountabilities**

1. To encourage and develop new and potential customers through the following:
  - Establishment of sales territories
  - Delivery of effective and proactive sales programmes
  - Co-ordination of sales calls
  - Development of new and potential customers through networking, courtesy and follow-up calls and cold calls.
  - Maintenance of a regular customer contact programme
2. To provide the Directors with a regular sales report and a monthly report of new business acquired.
3. To attend, as required, meetings to review and report on sales activity in order to agree actions accordingly.
4. To act as the main point of contact between the company and potential customers within the agreed geographical area and to develop a clear understanding of customers' requirements.
5. To provide professional advice and support to the customers of H&H Insurance Brokers as required either face-to-face or by telephone.
6. To work within the FCA rules and related procedures published by the company from time to time. This includes the Company's Compliance Manual and Training and Competence Manual
7. To monitor the sector for H&H Insurance Brokers and to maintain an awareness of new methods, services and products in order to ensure the company is capable of reaction to any developments and to ensure that personal knowledge of relevant rates and terms is current.
8. To improve the public perception of the company by face-to-face negotiations with customers and attendance on behalf of the company at required events.
9. To monitor customers in order to determine preferences.
10. To inform the internal administrative staff of the weekly call diary and any relevant changes to ensure that they are able to provide an efficient service to the customers of H&H Insurance Brokers.
11. To attend training and to develop relevant knowledge and skills.

**Secondary Accountabilities**

To maintain current knowledge with regard to Health & Safety and in particular to legislation relevant to the company in order to advise colleagues or seek advice accordingly.  
Operational ad hoc duties.