

Job Description – Commercial Marketing Executive – Insurance and Financial Services

Job Title: Commercial Marketing Executive – Insurance and Financial Services

Reporting To: Marketing Director

Overall job purpose

The dedicated day-to-day marketing partner for H+H's Insurance and Financial Services areas. Coordinate customer acquisition, nurture and retention requirements, translating complex services into clear briefs and relevant customer journeys. Help commercial teams make effective use of appropriate customer insight and relationships while ensuring materials follow H+H's required specialist approval processes.

Primary accountabilities

Commercial understanding and customer insight

- Meet regularly with insurance, sales and financial services colleagues to understand priority customer groups, service opportunities, capacity and conversion barriers.
- Maintain a portfolio calendar covering approved acquisition campaigns, relevant renewal communications, client events and proposition launches.
- Gather customer questions and feedback about protection, financial planning and service experience; use these to improve briefs and information.
- Identify relevant customer triggers, including property purchase, asset investment, succession or business change, for specialist review and suitable marketing activity.

Acquisition, nurture and retention coordination

- Prepare briefs specifying customer needs, approved proposition scope, audience eligibility, campaign objectives, response routes and required specialist approvals.
- Work with the brand manager on approved audience segments and customer journeys from initial response through appointment, quotation or adviser contact.
- Coordinate nurture and appointment-support content, ensuring messages reflect the relevant service and do not imply that every enquiry should follow the same sales process.
- Gather requirements for retention and renewal activity where appropriate, agreeing timing and responsibility with insurance and customer service teams.
- Identify common drop-off points and customer objections with sales colleagues; brief improvements to landing pages, follow-up materials and communications.

Accuracy, approvals and customer communications

- Gather product and service information from authorised specialists; maintain a record of factual checks, approvals and the version released.
- Route relevant materials through the designated compliance or authorised reviewer and obtain required sign-off before publication; escalate proposed changes after approval.
- Check that approved wording, disclosures, service scope and contact routes appear consistently in campaign and sales materials.
- Work with the brand manager and responsible internal teams to confirm audience permissions, preferences and eligibility before customer data is used.
- Coordinate customer stories and case studies with permission and specialist approval, avoiding unsupported claims about protection or financial outcomes.

Introductions, sales support and performance

Job Description – Commercial Marketing Executive – Insurance and Financial Services

- Help colleagues across H+H recognise potential insurance or financial services needs and make appropriate introductions to qualified specialists.
- Confirm an agreed introduction process and named follow-up owner; record referral source and progress using approved CRM fields.
- Gather sales and adviser requirements for approved presentations, service summaries, client briefings and event materials.
- Compile monthly qualified lead, appointment, quotation and conversion results as applicable to each service, alongside renewal and retention results where available.
- Review lead quality, conversion barriers, acquisition cost and customer development with commercial teams and functional managers.
- Keep briefs, delivery status and approvals current; ensure activity consistently supports One H+H and Rural Matters.

Cross selling and marketing collaboration

- Work closely with both functional Marketing Managers, the Content Creator / Designer and the other Commercial Marketing Executives to coordinate customer journeys, campaign briefs and approved communications.
- Develop appropriate cross-selling opportunities with the other portfolio executives, using approved customer targeting and referral processes to connect customers with insurance, financial and wider H+H specialists.

Social media content and campaign planning

- Keep the social media platforms serving Insurance and Financial Services up to date, including profiles, contacts, links and timely posts, within H+H's agreed channel strategy.
- Plan portfolio content and campaigns with the functional Marketing Managers, agreeing audiences, topics, channels, dates, objectives and response routes, including relevant cross-selling opportunities.
- Coordinate content including approved service explainers, customer questions, relevant protection and planning topics, and client events; gather expert input and brief marketing colleagues on required assets.
- Schedule and publish agreed content within assigned permissions, obtaining factual and required specialist approvals. Monitor responses, route enquiries and use results to improve plans.