

# Job Posting



<b>Job Title:</b>	Account Executive	<b>Reporting To:</b>	Michele Johnson, Manager Personal Lines
<b>Department:</b>	Personal Lines	<b>Location:</b>	Oakville Head Office
<b>Start Date:</b>	TBD		

## Company Overview:

*The Magnes Group Inc is one of Canada's leading independent insurance brokerages. Magnes has unique commercial insurance expertise in several industry niche markets, as well as private client insurance and corporate group benefits consulting. Magnes offers specialized services ranging from global insurance placement to innovative risk management strategies.*

*Magnes is licensed nationally across Canada with offices in Oakville, Toronto, Vancouver and Montreal. Magnes is also proud to be a member of the exclusive Assurex Global Network. Our clients benefit from strategic international partnerships with the ability to “think globally and act locally”.*

*Magnes proudly employs some of the best insurance professionals in the business. Our team consists of a dynamic group of individuals, including some of the brightest minds in risk management. Our vision is to be a “magnetic” organization that naturally attracts and retains the very best in class of clients, suppliers, partners, and most importantly, our employees.*

*For more information, visit our website: [www.magnesgroup.com](http://www.magnesgroup.com)*

## Position Summary & Objective:

- The Personal Lines Account Executive will be responsible for achieving specific sales targets. Principally to advise prospective clients on matters of coverage and pricing, to place the client’s risks with the most suitable market on a timely basis and to ensure the accuracy and integrity of documents and data according to the workflows of the brokerage.

## Essential Functions:

### Sales

- Respond to request for quotes from internal staff, group members, and all other sources
- Cross sell and upsell existing clients, seeking to further increase book size
- Solicit additional business from existing client base, and gain referrals to new prospects
- Round out accounts
- Schedule meetings with “qualified” prospects
- Present proposals to prospects, negotiate terms and ultimately close the sale
- Assist clients and family members with new insurance requirements
- Prepare all necessary new sales paperwork and submit to AA’s for processing
- Proactively ask for referrals from existing clients
- Develop COI’s and network in the community
- Cross sell into existing commercial book
- Identify potential Groups and market to these groups
- Develop marketing plans to gain new customers

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### Documentation

- Confirm all client files in the BMS are current and up to date
- Guarantee all client correspondence is attached to the BMS according to department standards
- Ensure activities in BMS are added and updated according to department standards
- Complete updates to all clients files and policies, promptly updating company portals

### **Additional Duties:**

- Attend onsite appraisals
- Order report such as MVR, AutoPlus and HITS
- Send COC's and binders when required
- Deliver client documents when necessary
- Maintain an ongoing working knowledge of all available carriers and products
- Actively participate in continued learning programs or training
- Attend company functions
- Correspond with underwriters
- Attend client meetings with Commercial Account Executives

### **Performance Expectations:**

- Adherence to department workflows
- Adherence to department service standards to clients, employees & vendors

### **Core Competency Standards:**

- ACCURACY AND ATTENTION TO DETAIL – Ability to perform work accurately and thoroughly.
- COMMUNICATION – Ability to communicate effectively with others using the spoken and written word. Ability to actively attend to, convey, and understand the comments and questions of others.
- CONFIDENTIALITY – Ability to maintain strict confidentiality in accordance with MAGNES privacy guidelines for client and employee information, as well as proprietary information.
- CUSTOMER ORIENTED – Ability to take care of the customers' needs while following company procedures.
- RELIABILITY – The trait of being dependable and trustworthy.
- TEAMWORK – Ability to be part of a team and work cohesively to achieve goals.
- TIME MANAGEMENT – Ability to utilize the available time to organize and follow a systematic method of prioritizing tasks in order to complete work within given deadlines.
- PROFESSIONALISM – Represent MAGNES professionally both internally and externally at all times.
- INITIATIVE – Ability to make decisions or take actions to solve a problem or reach a goal.
- SELF-MOTIVATED – Ability to be internally inspired to perform a task to the best of one's ability using his or her own drive or initiative.
- RESPONSIBLE – Ability to be held accountable or answerable for one's conduct.
- RESPECT – Values the backgrounds, experiences, opinions, feelings and the contribution of everyone in the course of delivering our services.
- INTEGRITY – Recognizes that building trust demands honesty. Displays a commitment to doing what we promise. Ability to be truthful and be seen as honest and credible in the workplace.
- INNOVATION – Constantly strives to improve both our culture and the value proposition to our customers by searching for better solutions, processes and tools.

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## Job Specific Competency Standards:

- ANALYTICAL SKILLS – Ability to use thinking and reasoning to solve a problem.
- ASSERTIVENESS – Ability to act in a self-confident manner to facilitate completion of a work assignment or to defend a position or idea.
- DECISION MAKING – Ability to make critical decisions while following company procedures.
- EMPATHETIC – Ability to appreciate and be sensitive to the feelings of others.
- NEGOTIATION SKILLS – Ability to reach outcomes that gain the support and acceptance of all parties.
- PRESENTATION SKILLS – Ability to effectively present information publicly.
- PERSUASIVE – Ability to influence others to change position or to adopt a specific point of view.
- PROBLEM SOLVING – Detects potential problems at an early stage and seeks to solve them before they escalate. Uses analytical skills and creativity to solve problems. Knows when to ask for assistance or advice. Utilizes the available resources of the company.
- PRODUCT AND MARKET KNOWLEDGE – Understanding and awareness of products and services offered, not only by MAGNES, but also by competitors. Takes the time to understand customer needs and is able to match products and services to those customer needs. Up to date on current industry changes.
- RELATIONSHIP BUILDING – Ability to effectively build relationships with customers, suppliers, and co-workers.
- WORKING UNDER PRESSURE – Ability to be flexible and complete assigned tasks under stressful situations in a professional manner.

## Skills & Qualifications:

Education	- University Degree, preferred
Languages	- Ability to speak French would be viewed as an asset
License & Certification	- RIBO License required, CAIB, CIP, & CRM is an asset
Industry Experience	- Minimum three years of industry experience
Computer Skills	- Proficiency in TAM, advanced MS Office & Excel skills
Other Technical Skills	- Working experience of Compuquote & Company Portals is a definite asset

## Compensation:

- Salary Range Guideline
- Bonus Incentives
- Vacation Days
- Personal Days & Birthday
- Sick Days
- Group Benefits Plan
- Registered Retirement Savings & Pension Plan
- Education Reimbursement
- Recruiting Referral Fees

Please send Cover Letter & Resume to: [Careers@magnesgroup.com](mailto:Careers@magnesgroup.com)