

Job Posting



Job Title:	Account Manager	Reporting To:	Michele Johnson, Manager Personal Lines
Department:	Personal Lines	Location:	Oakville Head Office
Start Date:	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

Position Summary & Objective:

- The Personal Lines Account Manager will be responsible for the complete management and retention on a specific book of business. Principally to advise the client 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

- 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
- Assist clients and family members with new insurance requirements
- Round out accounts
- Prepare all necessary new sales paperwork and submit to AA’s for processing

Customer Service

- Ensure that clients’ queries and requests are responded to in a professional and timely manner (internal & external)
- Develop strong, effective relationships with clients (internal & external)
- Ensure that the brokerage’s service commitments and standards are upheld

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- Work in a team environment alongside Producers and Account Administrators
- Proactively contact client in response to potential changes in the market or policy changes
- Act as an advocate on behalf of our clients to the insurance carriers

Renewal Reviews

- Prepare annual review reports, conducting client meetings to review the insurance program, making appropriate recommendations for improvement
- Confirm all underwriting information is accurate and up to date
- Ensure all coverage are adequate and all essential coverages are on policies
- Confirm all discounts and surcharges are on clients files

Remarket Policies

- Review files and ensure client is with the best market based on individual needs
- Quote policies with other markets when required
- Prepare all necessary remarket paperwork and submit to AA's for processing

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:

- Prepare COC's and binders of insurance
- Order report such as MVR, AutoPlus and HITS
- Maintain an ongoing working knowledge of all available carriers and products
- Actively participate in continued learning programs or training
- Correspond with personal insurance underwriters
- Assist clients with completion of applications
- Contact clients in regards to billing issues (agency or direct)
- Exhibit the core values of the Magnes team

Performance Expectations:

- Adherence to department workflows
- Adherence to department service standards to clients, employees & vendors
- Adherence to individual goals such as retention, sales, quality and renewal reviews

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.

Job Specific Competency Standards:

- ANALYTICAL SKILLS – Ability to use thinking and reasoning to solve a problem.
- CONFLICT RESOLUTION – Ability to deal with others in an antagonistic situation.
- 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.
- 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.

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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