

New Business Account Executive, (Commercial Insurance) Stockport

About DR&P

David Roberts and Partners was formed in 1977. Founded in Ormskirk, before moving to Southport, the organisation has now grown into a family of independent insurance brokers. With businesses spanning the UK and Europe. We have a team of over 550 dedicated colleagues, we place over >£630m premium worldwide with direct access to Lloyd's of London and other specialist international markets. While our businesses operate at a local level, the Group's infrastructure empowers us to compete with and win against the multinational brokers. The objective is always to provide the best possible service and protection for our clients.

Following a sustained period of growth, where DR&P Group has acquired multiple insurance business and is continuing to grow both organically and through acquisition, the group is now embarking upon the next chapter following our acquisition by BMS Group.

About BMS Group

BMS is a dynamic, independent, global broker established in 1980, delivering specialist insurance, reinsurance, and capital markets advisory services. We are a global brand with offices located across the US, Canada, Latin America, Australia, Europe and Asia with both a strong, local focus and understanding of market needs.

Our teams are respected globally for their specialist market knowledge, intelligent analysis and insight. Our people strive to be 'the best in class' and with an innovative approach and their entrepreneurial thinking, our clients truly benefit from better solutions to policy development and placement.

Being independent makes a key difference to our clients, giving our brokers the freedom to deliver the best solutions, tailored to meet their business needs. Coupled with our collaborative team approach, single platform worldwide and renowned personal service, we are the independent broker of choice.

Summary of position

Lloyd Bolam is an independent insurance broker based in Stockport and is part of one of the UK's largest independent brokers, DR&P Group. We specialise in mid/large commercial business across all sectors. We pride ourselves on our professionalism and the excellent service provided to our clients.

This is an excellent opportunity for an experienced insurance professional looking for a new and unique challenge in a brokerage that has a highly respected reputation in the UK market.

Key responsibilities & accountabilities

- **Client Acquisition** – Proactively identify and pursue new business opportunities. This will mostly be driven by your own prospecting; however, leads will occasionally be provided by the wider group's telemarketing team. Must be able to work towards realistic and achievable income targets. Cases won by the branch director will largely be passed onto the successful applicant, which would form part of the applicants book of business.
- **Client Relationship** – Build and maintain strong relations with potential clients, understanding their insurance needs in order to provide tailored solutions at both the new business stage and throughout the broker/client relationship. Work well with account handlers to ensure a smooth onboarding process.
- **Business Retention** – Ensure retention of clients you have acquired by project managing accounts, ensuring excellent delivery of service, conducting mid-term and renewal meetings. You will have support from a strong account handling team to handle admin tasks such as mid-term adjustments.
- **Negotiation** – Conduct negotiations to secure favourable terms and agreements.
- **Compliance** – Ensure staying on track with both industry trends and regulatory requirements and standards.
- **Sales Reporting** – Provide regular reports on new business activities, achievements and challenges.

What we're looking for

- Cross-class commercial insurance experience.
- Exemplary customer service skills with the ability to build solid relationships with clients & colleagues.
- Tenacious, with experience of working in a target-driven & fast-paced environment.
- Must be able to generate own leads & follow these up to build a strong pipeline of potential clients.
- Strong market & insurer knowledge & relationships.
- Ability and flexibility to work as part of a team or independently.
- Industry qualifications are desirable but not essential.

What's in it for me?

A highly ambitious team that works collaboratively to achieve your personal and professional goals whilst being a significant contributor to the overall success of the organisation

- 25 days holiday+ 1 day birthday leave (+8 recognised public and bank holidays)
- Career progression
- An exciting and collaborative professional environment
- A position in a secure company experiencing rapid growth
- Competitive holiday allowance
- Death in-service cover of 4 x salary
- Company pension scheme
- Sickness policy
- Competitive salary and excellent bonus system
- Top-tier mileage allowance
- Support with industry qualifications

Through our Diversity, Equity and Inclusion (DEi) vision, we are committed to 'building a culture of belonging for all, valuing diverse perspectives and embracing authenticity.' As such, we have created our 'BMS Together' programme, with dedicated training, collaborative committees and intentional partnerships. In support of our ESG vision, we offer two additional paid days each year to take part in charitable work.

Please let our team know if you require any adjustments to support you through the application process.

David Roberts & Partners (Insurance Brokers) Ltd

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