

Commercial Account Executive, Birmingham

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

We're looking for an experienced Commercial Insurance Account Executive to join the busy team, responsible for managing and developing a portfolio of insurance clients, delivering tailored insurance solutions, and driving revenue growth. The role focuses on building long-term client relationships, leading renewal and new business activity, and working closely with Account Handlers to ensure excellent service delivery.

Key responsibilities & accountabilities

Client Management & Relationship Building

- Act as the main point of contact for assigned clients, providing strategic insurance advice
- Build and maintain strong, long-term relationships with clients through regular engagement
- Lead client meetings, presentations, and renewal discussions
- Ensure a high standard of service and client satisfaction at all times

New Business & Growth

- Identify and pursue new business opportunities through networking, referrals, and existing relationships
- Expand existing accounts through cross-selling and up-selling insurance products
- Achieve individual and team revenue and retention targets
- Develop and present tailored insurance proposals to prospective clients

Renewals & Market Negotiation

- Lead renewal strategies and negotiations with insurers and underwriters
- Obtain competitive terms and coverage aligned with client risk profiles
- Collaborate with Account Handlers to ensure renewals and mid-term adjustments are processed accurately and on time

Technical & Compliance

- Provide technical insurance advice across relevant product lines
- Maintain a strong understanding of market conditions and insurer appetite
- Ensure all activity complies with FCA regulations and Treating Customers Fairly (TCF) principles
- Accurately document advice, decisions, and client communications

Internal Collaboration

- Work closely with Account Handlers, claims teams, and placing teams to deliver a seamless service
- Support and mentor junior team members where required
- Contribute to process improvements and business development initiatives

What we're looking for

- Proven experience as an Insurance Account Executive, Account Manager, or similar role
- Strong knowledge of commercial insurance products and the broking market
- Commercially focused with a strong track record of revenue generation
- Ability to manage a portfolio of clients independently
- Established insurer and market relationships would be beneficial but not essential
- Experience acquiring and converting new business
- Excellent communication, presentation, and negotiation skills

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)
- Company Pension Scheme
- Company Social Events
- Discretionary annual bonus linked to the business hitting KPIs
- Life Cover
- Mediacash Cash Plan
- Income Protection
- Access to Cycle to Work Scheme

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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