POSITION DESCRIPTION

ROLE	**SENIOR ACCOUNT EXECUTIVE**
DEPARTMENT	**GENERAL LINES**
REPORTING TO	**Managing Director – Queensland**
KEY RESPONSIBILITIES	• Manage a portfolio of mid-market and commercial accounts, ensuring high quality client service is provided at all times • Consistently attain set revenue and expense budgets • Implement Bluebook's values; provide empathy, insight and expertise across the portfolio of clients in the placement and management of their insurances
ACCOUNTABILITIES	**Account Management**
	• Meet and exceed service standards agreed in the client's service agreement • Consistently meet and exceed revenue and expense budgets • Develop and maintain effective long-term relationships with key client decision makers and frequently monitor any changes within the client organisations to preserve and protect the Company's relationship with the client • Take a pro-active approach to all aspects of account management and service delivery to clients, ensuring client needs are identified and met in line with agreed service standards • Ensure the accuracy and timely delivery of all documentation to clients • Implement successful account retention and marketing strategies • Maintain an awareness of all large and potentially complicated claim related matters and assist claims personnel in the negotiation of equitable claim settlements on behalf of clients • Engage with and manage all internal stakeholders in delivering Bluebook's values to your client base • Develop and maintain meaningful working relationships with insurers through regular contact and liaison • Possess a thorough understanding of all major classes of insurance which the Company offers to its clients and keep abreast of all new technical and product developments • Possess a thorough working knowledge of all aspects of the Insurance (Agents & Brokers) Act, Insurance Contracts Act, Fire Services Levy, Stamp Duties, Worker's Compensation and other relevant legislation and keep abreast of all new developments.

	Administration and Technical

	• Ultimate responsibility for the timely and accurate production, processing and delivery of client related:
	  ◦ Invoices and related policy accounting documentation.
	  ◦ Quotation and placing slips.
	  ◦ Premium and adjustment calculations.
	  ◦ Information and documentation for Pre-Renewal and Broking meetings.
	  ◦ Policy wordings and endorsements.
	  ◦ Renewal reports and insurance manuals.
	  ◦ Certificates of currency.
	  ◦ Up to date computer system records.
	  ◦ Current and outstanding documentation follow ups.
	  ◦ All other documentation.
	• Adhere strictly to the Company's compliance systems and procedures
	• Support related/nominated lines and portfolios of other staff members during their temporary absences from the office based on knowledge of and experience with the relevant line or portfolio
	• Other duties as may be required from time to time

	Performance Management
	Set and agree Performance Goals each year with your Manager encompassing the following key areas: • Clients. • Colleagues. • Growth. • Complete a formal development plan with your manager
	Revenue Generation
	• Recognise and capitalise upon revenue generation, growth and other opportunities • Actively develop additional business from existing portfolio • Develop new business opportunities from existing portfolio and other sources • Unconditional support for all Company sponsored revenue generation initiatives

QUALIFICATIONS	• Professional Accreditation/Membership (if applicable):
	  ◦ ANZIIF – Associate
	  ◦ NIBA – QPIB
	• Meets the training requirements of Tier 1 FSRA Compliance
	• Maintain CPD training register and ensure adequate points obtained each year