

# Account Manager, Personal Insurance

Saskatchewan | Reporting to: Manager, Personal Insurance

## THE ROLE

The Account Manager is responsible for managing a book of business, servicing clients in a courteous and professional manner, and providing customized service to clients to allow a seamless execution of our Personal Insurance service strategy.

As an Account Manager, you possess a solid understanding of personal insurance, our internal processes and service culture. Driven by your fact-finding, high follow-through instinct and meticulous attention to detail, you excel in resolving challenges with policy renewals, adapting to evolving client's needs and fostering client retention while consistently delivering exceptional customer service, one client at a time.

## WHAT YOU'LL DO:

- Most importantly, you will lead by example, live our values, and drive business relationships for the company by providing exceptional customer service.
- Service an existing book of business, and grow personal lines through referrals, walk-in clients, and personal networks.
- Regularly and thoroughly review existing accounts and recommend appropriate coverage and advice based on clients' exposures.
- Proactively notify clients of changes, including renewals and policy updates.
- Review clients' existing coverage and remarket as appropriate.
- Efficiently handle all aspects of policy documentation, including new business, renewals, endorsements, and related tasks, maintaining accurate records within EPIC.
- Maintain organized and accurate records of client information and insurance policy details within our database software and relevant systems.
- Provide clients with prompt service and customized advice, responding to general inquiries via telephone, email, or walk in, from clients, colleagues, and other parties.
- Identify cross-selling opportunities to turn single line clients into multi-line clients and collaborate effectively with our Venture and Commercial teams to ensure seamless operation.
- Regularly review expiry lists, keep track of policies to renew or pending policies and follow up with clients as needed.
- Work closely with Account Executives and other staff on all aspects of client service and renewal while adhering to HK Henderson's best practices and standard procedures.
- Assist clients with reporting claims and understanding the process.
- Provide back-up support for the Auto Insurance Team as needed.
- Proactively support the team by taking work from the central queue without prompts.
- Maintain and update EPIC and ensure workflows are followed.

Local Touch. National Strength.™

HK HENDERSON

NAVACORD®

- Continuously develop strong knowledge of insurance products and attend mandatory seminars as required to stay updated and informed.
- Actively develop an increased knowledge of related insurance products and client needs.
- Other duties as required.

## WHAT WE REQUIRE:

- Must hold a Level 1 General Insurance License.
- Strong communication skills both verbally and in written correspondence.
- Commitment to delivering exceptional service and exceeding client expectations.
- High follow through and strong organizational skills to manage policy and renewals with accuracy.
- A well-defined sense of diplomacy and business acumen with a focus on customer service and overall client experience.
- Skills in problem solving, critical thinking, decision making, teamwork, communication, innovation, and adaptability.
- Proficiency in Microsoft Office Suite.
- Experience with internal Broker Management Systems (EPIC) considered an asset.

*HK Henderson is actively committed to supporting diversity, equity, and inclusion. We serve and recognize and respect human differences and similarities. We value the diversity of people and actively encourage women, indigenous peoples, members of visible minorities, people with disabilities, and lesbian, gay, bisexual, transgender, and queer (LGBTQ2+) persons to apply.*

## BUILDING THE GREAT CANADIAN BROKERAGE

Navacord is a leading insurance and risk management brokerage created to keep the Canadian entrepreneurial spirit alive. Led by a passionate and engaged partnership group, Navacord Broker Partners are committed to the success of their clients by delivering expert advice in an increasingly complex world which allows them to face the future with confidence.

**4th Largest Commercial Brokerage in Canada**

**2,000+ Employees**

**50,000+ Commercial Clients**

**~\$400mm Revenue**

**60% Commercial Lines**

**25% Personal Lines**

**15% Benefits & Retirement**

**~\$3 billion Annual Premium**

Qualified candidates are invited to email their resume and cover letter to: [careers@hkhenderson.ca](mailto:careers@hkhenderson.ca)