

CLIENT EXECUTIVE – PERSONAL LINES



TOLL FREE 1 888 404 0000
www.mcleanhallmark.com

DIVISION/DEPARTMENT: Personal Insurance		
JOB TITLE: Client Executive		
Reports to: Assistant Vice President, Personal Lines		
	Type of position: <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Contractor	Hours 35/week
GENERAL DESCRIPTION: <ul style="list-style-type: none">• Following the McLean Hallmark sales system to identify prospective Personal Insurance Clients through:<ul style="list-style-type: none">○ Incoming sales calls○ Referrals○ Networking with personal "Centre's of Influence"○ Calling mono-line, former clients and previously quoted lists prepared by McLean Hallmark○ Networking with other McLean Hallmark staff to generate internal referrals○ Prospecting via cold calls &/or emails○ Diligently following up with prospective leads/quotes to move them along the sales cycle○ Responding to company sponsored advertising and marketing driven leads• Prepare quotes and submit new business on behalf of prospective clients (in conjunction with personal lines underwriting staff) to insurance companies while ensuring clients' interests are properly protected.• Hand-Off clients to our client managers for their ongoing service needs once the account is sold and policy is issued• Notwithstanding what has been mentioned above it may be appropriate and necessary to address client inquiries and concerns from time to time.• Document all client & prospect contact in the "Activity" and "Notes" sections of the broker management system following McLean Hallmark procedures.• Identify opportunities and facilitate access for other McLean Hallmark team members to provide insurance products to the client, his/her organization (e.g. business insurance, Directors and Officers, Employee Benefits, etc.)• Flexible work schedule available but weekends and evenings may be required.		
QUALIFICATIONS <ul style="list-style-type: none">• RIBO license required• 2+ years Personal Lines Experience with at least one year of proven insurance sales experience• Industry designations such as CAIB, CIP, etc are an asset.		
SKILLS <ul style="list-style-type: none">• Excellent communication skills• Proven sales ability• Results oriented professional with strong work ethic• Proven sales ability• Unwavering commitment to delivering a professional sales and service experience to clients• Team player• Proficiency with applied Tam &/or EPIC and Applied Rating Services a definite asset• Speaking additional languages would be considered an asset		
Email Applications to: vspina@mcleanhallmark.com		

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