

Position Description

Position Title	Internal Account Manager – Commercial & Domestic
Employment Status	Permanent- full time / part time
Business Hours	8:30 – 5:00 (flexible and hybrid work arrangements available)
Location	Level 1, Hamilton House 46-54 Charles Street, Launceston.
Award & Classification	Banking, Finance and Insurance Award 2020
Reports To	Executive Manager People, Culture & Strategy
Direct Reports	Nil

About Us

Who we are:

McKillop Insurance Brokers have been around since 1975 and are part of the Steadfast Broker Network. We strive to understand the needs of each individual client, looking at the whole solution required and tailoring insurance to suit.

What we do:

We support business and individual clients with a tailored, simple and stress free approach. Whether it be for commercial or personal insurance cover, our focus is on delivering the right advice and getting the best outcomes for our clients.

Our values:

We are people focused, we support our clients and team with professionalism, warmth and integrity. Understanding and approachable we aim to provide service excellence to our clients with each and every interaction and support our team to grow and flourish in their roles.

Position Purpose

Providing exceptional service to our clients you will be responsible for managing a portfolio of existing commercial and domestic clients from renewals and claims through to understanding the needs of new clients.

You will enjoy developing client relationships and working as part of a dedicated team of professionals.

Key Responsibilities

Client Relationship Management

- Maintain and strengthen relationships with assigned client portfolio
- Serve as primary contact for day to day client inquiries and requests
- Conduct regular client reviews to assess insurance needs and identify opportunities
- Proactively communicate with clients regarding policy changes, renewals and market conditions

Insurance Operations

- Coordinate policy renewals including gathering all information from clients and negotiating terms with underwriters in a timely manner
- Process policy amendments, endorsements and cancellations in accordance with agreed objectives
- Act on behalf of the client in the management and settlement of claims ensuring a timely and favourable outcome where possible
- Maintain accurate client records and policy documentation updating as needed and in line with McKillops One Best Way
- Prepare renewal documentation and presentations for clients aligned with McKillops policy and procedural framework
- Liaise with insurers on claims and policy queries

Business Development Support

- Identify opportunities with existing and new clients to provide tailored insurance solutions and closing insurance gaps
- Support other areas of the business as needed including Account Executives and Executive Directors
- Contribute to client retention strategies and initiatives

Administration and Compliance

- Ensure all activities comply with RG146 requirements and McKillops policies and procedures
- Maintain accurate records of client interactions and transactions ensuring these are stored in the relevant management system
- Support audit and compliance activities as required

Qualifications, Skills and Experience

What you'll need

- ANZIIF Tier 1 accreditation
- Great communication skills both written and verbal with the ability to speak confidently with clients at all levels
- General insurance broking experience – ideally across retail and wholesale products
- Excellent attention to detail, strong accuracy and the ability to manage time effectively in a busy environment
- Ability to use initiative, be results driven and motivated by a genuine desire to achieve the best outcomes for McKillops and our valued clients
- Experience with Sunrise/Insurer Portals and MS Office

Desirable

- ANZIIF Diploma Financial Services (Broking), or progress towards
- Experience with Insight

Working with McKillops

At McKillops we pride ourselves on supporting our people to grow and provide a fun environment where you will enjoy:

- ✓ Professional development opportunities and career pathway progression
- ✓ Regular team building activities
- ✓ Flexible working arrangements including hybrid work and a flex day
- ✓ EAP
- ✓ Enjoy discounts through the Steadfast broker network including health insurance and travel insurance to name a few

Success Indicators

What Success Looks Like

Client Service Excellence	<ul style="list-style-type: none"> ✓ Satisfaction with tailored insurance service ✓ Regular communication, well informed of changes and updates ✓ Activities undertaken to a consistently high standard ✓ Compliance and records are up to date ✓ Retention rate within own portfolio
Teamwork	<ul style="list-style-type: none"> ✓ Collaborating where possible and sharing the load when you can ✓ Supporting others to succeed, demonstrating the principle that Together Everyone Achieves More ✓ Reliable, consistent, accountable, approachable