

## ABOUT US

We are an independent, Ipswich-based Chartered Insurance Broker providing business insurance solutions to organisations in Suffolk and beyond.

Our people are at the heart of the quality service we provide to our clients and are our most important asset; investing in their continuous development is a significant business priority.

We are delighted to hold the Investor in People accreditation, demonstrating our commitment to excellent client service, delivered by professional, qualified people with a can-do attitude.

## WHAT WE OFFER YOU

- Competitive pay and bonuses
- Pension and life assurance
- Up to 25 days holiday (plus bank holidays)
- Days off for volunteering
- Financial support and rewards for study towards professional qualifications
- Wellbeing and worklife balance; providing breakfast, a cycle-to-work scheme, flu vaccinations and flexible working arrangements
- Reward schemes for those who go above and beyond
- Regular social events

# WE'RE RECRUITING RELATIONSHIP MANAGER

## Role purpose - you will:

- Successfully lead and manage a portfolio of existing client accounts in close collaboration with Client Executives;
- Work closely with the Finance and Commercial Director to engage in new business activity and achieve new business targets in accordance with the business plan;
- For both existing client accounts and new business opportunities, carry out face-to-face client meetings to:
  - Develop a strong understanding of your clients' businesses, their attitude to risk and their approach to insurance and risk management;
  - Clearly identify client demands and needs;
  - Accurately identify gaps in cover and potential cross-sell/upselling opportunities;
- For both existing client accounts and new business opportunities:
  - Collate and provide Client Executives with comprehensive meeting minutes and risk information, giving clear instructions to empower their negotiations with insurers, providing support where required;
  - Working in collaboration with Client Executives, deliver comprehensive and considered risk presentations to clients which meet identified demands and needs and address risk exposures;
- Build and maintain excellent working relationships with clients, prospects, colleagues, insurers and other partners/suppliers;
- Actively contribute to deliver the vision in line with business strategy;
- Support the Operations Manager with maintaining the quality of our service and pursuing continuous improvement;
- Act as a role model and technical referral point, sharing your knowledge and experience with the Client Servicing team;
- Be a well-known and respected figure in your operating area with a presence in appropriate networking organisations.

## OUR VALUES

We are customer focused

We are committed to pursuing improvement, honouring our commitments, creating value and paying attention to the detail so we can deliver exceptional customer outcomes for our customers and clients.

We invest in our people

We are committed to being a 'Great Place to Work' where all of our people feel valued, involved, inspired, rewarded and supported to develop and grow.

We do good in our communities

We are committed to having a positive impact on all the communities we interact with – including our staff, clients and customers, suppliers and the locations in which we operate.

## HOW TO APPLY

If you're ready to apply for our Relationship Manager role, please email [del.sharman@poundgates.com](mailto:del.sharman@poundgates.com) attaching your CV and a covering note.

If you have any questions, please call Del on Tel: 01473 346030.

STRICTLY NO AGENCIES

## Required skills and experience - you will be:

- A proven risk manager with a strong track record of identifying risks and proposing solutions;
- A strong client advocate, determined to achieve great client outcomes;
- A proven leader who takes ownership and uses initiative;
- A strong influencer and negotiator who maintains excellent working relationships at all levels;
- A problem solver with a resourceful, collaborative and analytical approach;
- Proactive in identifying and contributing viable solutions and embracing change;
- A clear communicator with excellent presentation and report writing skills and strong attention to detail;
- An experienced (10 years +) commercial broker with a deep understanding of the commercial insurance market and wide product knowledge across the full range of commercial insurance classes;
- Qualified to at least Cert CII level (preferably higher);
- A competent user of Microsoft programmes, including Word, Excel and PowerPoint;
- An experienced Acturis user (preferable);
- Fully conversant with and competent in all aspects of the FCA's ICOBS rules as it relates to the role and the importance of treating customers fairly.



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