

JOB DESCRIPTION

Job Title	Account Executive	Job Reference No.	
Department	Sales & Strategy	Created / Revised	August 2022
Reports to	Assistant Vice President- Sales (JA)	Staff Supervised	

Type of position:	<input checked="" type="checkbox"/> Full-time	<input type="checkbox"/> Part-time	<input type="checkbox"/> Contractor	Intern
-------------------	---	------------------------------------	-------------------------------------	--------

OVERALL RESPONSIBILITY

To establish and develop effective business relationships, maximize revenue streams and long-term profitability.

ACCOUNTABILITIES

Account Management

- Meet and/or exceed assigned revenue targets.
- Responsible for the management of assigned client portfolio, ensuring retention of the business for long term profitability.
- Develop in-depth understanding of client's business direction, challenges, and opportunities, designing solutions that contribute to the client's business and CUNA Caribbean's success.
- Expand clients' participation in CUNA Caribbean's products and services by demonstrating the value to the clients' business.
- Meet the needs of and support the company's clients through presentations, seminars, product and process training and other information sessions with key client representatives and their members/staff.
- Identify and bring in other CUNA Caribbean experts to corporate clients in satisfying complex business needs.
- Meet with partnering clients regularly to discuss progress, results, issues, and concerns related to the achievement of sales targets and the retention of the business.
- Identify, and convert market insights into sustainable selling opportunities.
- Leverage new and existing client relationships to meet and/or exceed assigned target.
- Relationship Strategy: Develop and leverage a client relationship strategy that that facilitates the acquisition of new business and the retention of existing business.

Other

- Provides insights and feedback to management to support the creation of new product and service offerings to satisfy market demands.
- Undertakes special projects and assignments from time to time.
- Ensure adherence to approved custodial procedures for all negotiable instruments.
- Represent CUNA Caribbean Insurance at industry level from time to time.
- Other duties as assigned.

SKILLS REQUIREMENTS

- Excellent communication skills oral and written, including presentation skills
- Superior relationship building skills: Exhibits the core skills required to form strong interpersonal relationships.
- Superior relationship management skills: Develops, manages, grows and institutionalizes complex relationships.
- Demonstrated ability to effectively assimilate and transfer knowledge to others
- Excellent negotiation, problem solving skills
- Strong organizational and planning skills

EXPERIENCE REQUIREMENTS

- Five (5) years demonstrable experience in a Sales role

EDUCATION, KNOWLEDGE AND CERTIFICATION REQUIREMENTS

- Possession of Ordinary Long-Term Life Insurance License or willingness to complete
- Diploma/Degree in Marketing, Business or industry-relevant professional designation
- A valid driver's license