

JOB DESCRIPTION

Job Title	Account Executive	Job Reference No.	
Department	Sales & Strategy	Created / Revised	February 2026
Reports to	Manager, Business Development	Staff Supervised	

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

The Account Executive identifies recruits and develops channel partnerships, cultivates effective business relationships, maximizes revenue streams and ensures long-term unit profitability for the Affinity Group (AG) portfolio of Cuna Caribbean Insurance’s (CCI) business.

ACCOUNTABILITIES

Business Development

- Conduct Market research on channel partners suitable for collaboration on the offering of CCI products and onboard suitable partners under the AG portfolio.
- Provide reports on portfolio strategy and attainment at agreed schedules. Meet with partnering clients quarterly to discuss progress, results, issues, and concerns related to achieving sales targets, expanding market penetration, and retaining business.
- Analyze global, regional and national trends to recommend solutions and sustainable revenue streams aligned to CCI’s market geography and scale.

Account Management

- Meet and/or exceed assigned revenue, new business and new organization targets.
- Manage 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 CCI’s success.
- Expand client participation in CCI’s products and services by demonstrating the value these offerings bring to their 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 engage with other CCI experts to support corporate clients in satisfying complex business needs.
- Leverage new and existing client relationships to meet and/or exceed assigned targets.
- Relationship Strategy: Develop and leverage a client relationship strategy that facilitates the acquisition of new business and the retention of existing business.
- Assist in the development of marketing and advertising campaigns as required, in collaboration with the marketing function of the company.

Other

- Provides insights and feedback to management to support the creation of new products and services 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 CCI at the industry level from time to time.
- Maintain a professional social media presence actively engaging with CCI's potential clients.
- Other duties as assigned.

SKILLS REQUIREMENTS

- Proficient in Microsoft Office Suite, with advanced knowledge of Excel, Word, and PowerPoint
- Strong presentation skills: able to engage audiences of all sizes and levels, both online and in person.
- Proven sales execution skills: able to identify and manage channel partners to drive business profitability.
- 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.
- Adaptability and resilience: Ability to pivot from negative responses to achieve positive customer outcomes.
- Demonstrated ability to effectively assimilate and transfer knowledge to others.
- Excellent communication skills both oral and written.
- Excellent negotiation and problem-solving skills.
- Strong organizational and planning skills.

EXPERIENCE REQUIREMENTS

- Five (5) years' demonstrable experience in a Sales role
- Experience in Channel Management or in the Insurance Field will be an asset.

EDUCATION, KNOWLEDGE, AND CERTIFICATION REQUIREMENTS

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