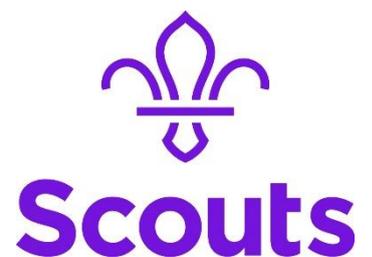




# Applicant Information Pack

## Account Executive

 Lancing, West Sussex



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# Welcome

We're Scouts and everyone's welcome here. All genders, races and backgrounds. Every week we give almost half a million people aged 6-25 the skills they need for school, college, university, the job interview, the important speech, the tricky challenge and the big dreams: the skills they need for life.

At a time when communities are becoming more divided, we bring people together. We encourage our young people to do more, learn more and be more. We're a worldwide movement, creating stronger communities and inspiring positive futures. We welcome talent from all backgrounds and your contribution to help even more young people succeed in life.



Carl Hankinson, UK Chief Commissioner



Matt Hyde, Chief Executive



**“As a young boy, Scouting gave me a confidence and camaraderie that is hard to find in modern life. Kids in the UK need a sense of belonging and community more than ever. I’m proud to be the Chief Scout in the world’s greatest youth movement. It is the biggest privilege I have ever had – more than [serving in] the SAS or [climbing] Everest.”**

**Bear Grylls, Chief Scout**



# Our strategic plan

## Skills for Life

### Our plan to deliver better futures

#### Our vision

By 2025 we will have prepared more young people with skills for life, supported by amazing leaders delivering an inspiring programme.

We will be growing, more inclusive, shaped by young people and making a bigger impact in our communities.

#### Our mission

Scouting actively engages and supports young people in their personal development, empowering them to make a positive contribution to society.

#### Our values

We act with care, respect, integrity, cooperation, exploring our own and others' beliefs.

#### Our goals

Our plan is to build on the success of the previous plan: to continue to grow, become more inclusive, to be shaped by young people and to make a bigger impact in our communities. We have set new goals for 2025.

Growth	Inclusivity	Youth Shaped	Community Impact
<ul style="list-style-type: none"> <li>50,000 more young people aged 6-18 in Scouts</li> <li>10,000 more frontline adult volunteers (Section Leaders and Assistant Section Leaders)</li> <li>5,000 more Young Leaders</li> </ul>	<ul style="list-style-type: none"> <li>we will have started Scouts in 500 more areas of deprivation reaching young people who could benefit the most</li> <li>our adult volunteers will reflect the demographics of our society</li> </ul>	<ul style="list-style-type: none"> <li>250,000 young people will be shaping their experiences at Scouts</li> <li>50% of young people will be achieving the top awards</li> </ul>	<ul style="list-style-type: none"> <li>at least 250,000 young people will be making a positive impact in their community each year</li> <li>50% of young people will be achieving the top awards</li> </ul>

#### Our programmes of work

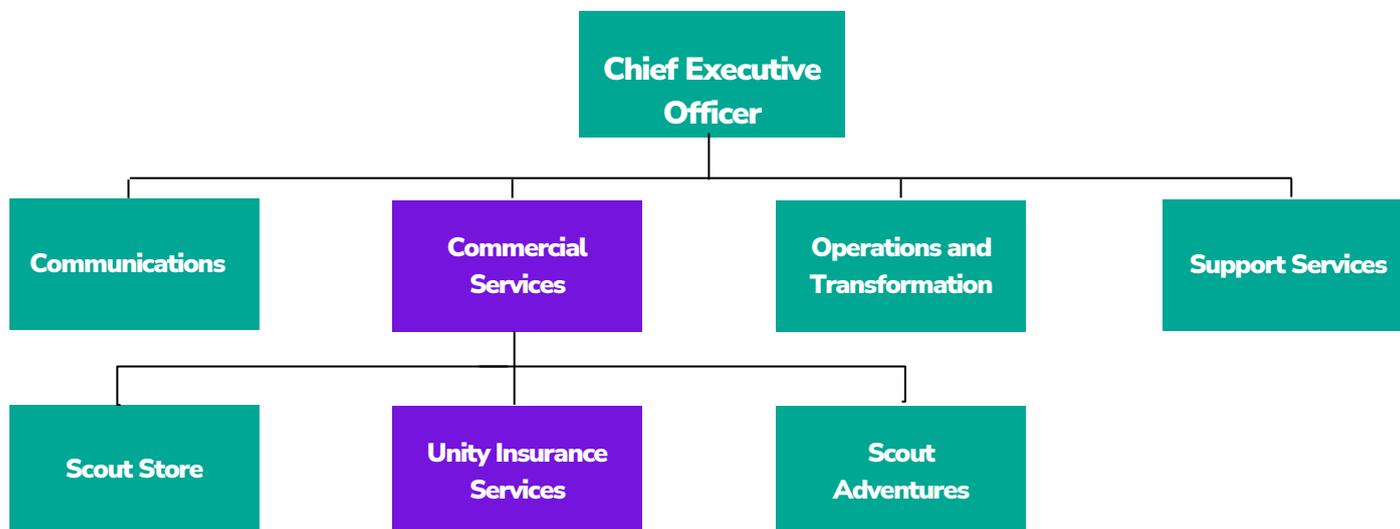
Due to the impact of COVID-19, our Skills for Life strategy has been extended until 2025. The programmes of work that'll help us to achieve this strategy have been revised to: People, Programme, Perception, Digital and Early Years.

We're involving people on the ground every step of the way in the updated strategy, to make sure anything new works for the majority and genuinely make things better, easier and more fun.

<p><b>Programme</b></p> <p>A fun, enjoyable, high quality programme consistently delivered and supported by simple (digital) tools.</p>	<p><b>People</b></p> <p>More, well trained, better supported and motivated adult volunteers and young people, from diverse backgrounds.</p>	<p><b>Perception</b></p> <p>Scouts is clearly understood, more visible, trusted, respected, and widely seen as playing a key role in today's society.</p>
<p><b>Digital</b></p> <p>Embedding our digital principles and transforming the Scouts experience with better digital tools.</p>	<p><b>Early years</b></p> <p>Provide more young people with skills for life through a new section for four and five year olds.</p>	

# Our structure

The UK headquarters of the Scouts is based at Gilwell Park (Chingford, London), and is operationally divided into four directorates:



## Unity Insurance Services

Unity Insurance Services have been insuring Not for Profit organisations for over 80 years. We're an experienced insurance broker that understands the needs of charities and community groups. We know the importance of having insurance policies that can be trusted. That's why we work hard to find simple solutions to complex needs. We offer specialist services to Scouts, Girlguiding, charities, community groups and not-for-profit organisations; all with an experienced and empathetic approach to our customers. We're owned by the Scouts, a charity in its own right, and like them we understand the importance of making a difference to the lives of others. We share the same values of integrity, respect, care, belief and cooperation.

With all our profit going back into The Scout Association, each day we are contributing to young people gaining Skills for Life.

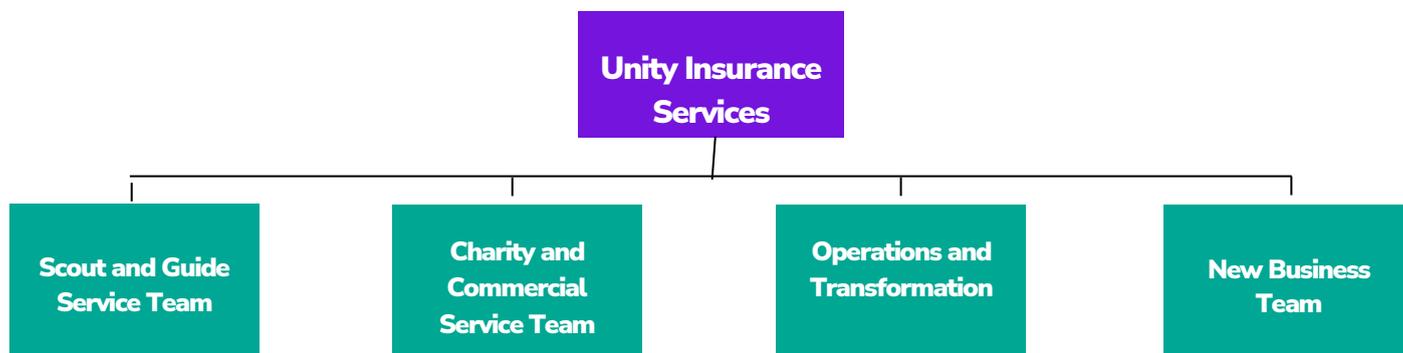
We are a growing business that places importance both on bringing in new clients but also on providing a great service to existing clients. This has been reflected in our customer feedback, where in 2018, 80 per cent of customers said they would recommend us based on our service.

Developing our people is the key to our success and something we value greatly.

Our strategic aim is to be the insurance broker of choice for the charity sector and we welcome talent to join us in achieving this aim.

# Team structure

Unity Insurance Services is based in Lancing West Sussex.



## The role

<b>Responsible to:</b>	New Business Team Leader
<b>Department:</b>	Commercial, Unity Insurance Services
<b>Base Location:</b>	Lancing, West Sussex
<b>Term:</b>	Permanent
<b>Salary:</b>	£ 34,266 per annum, Band F level 3
<b>Hours:</b>	35 hours/week
<b>Line Management Responsibility:</b>	None
<b>Budgetary responsibility:</b>	None
<b>External Contacts:</b>	People and organisations from the Scouting, Guiding charity and business sectors. Suppliers and service providers, insurers and the general public.
<b>Internal contacts:</b>	Director of Commercial, MD, senior managers, other Unity and HQ colleagues.
<b>DBS:</b>	Basic

*The above list is provided for guidance only and is not an exhaustive list of all the contacts with whom the post holder may be required to liaise.*

# Core purpose

To manage a book of business of existing clients and develop a pipeline of new business in relation to commercial insurance, whilst ensuring full FCA compliance.

To generate revenue for the business and ensure a quality service is provided to all clients in accordance with their needs and requirements.

# Key tasks

## Duties and Responsibilities:

- Ensure accuracy, efficiency and professionalism when dealing with both client and insurer:
  - Prospect new leads
  - Client visit/initial contact
  - Identification of needs
  - Negotiation and presentation to insurers in order to secure most appropriate cover for the client
  - Presentation of recommendations and cover to the client
  - Closing the sale and ensuring cover is on risk
  - Securing cross selling business and referrals
- Monitor own sales performance in line with targets and effectively manage the client portfolio
- When transacting business, be conscious of profitability to both the underwriters and the brokerage, and costs of client handling (including the scheduling of client visits).
- Ensure all business activity fully complies with FCA regulation and company procedures as detailed in the Conduct Policies and Guides to Best Practice.
- Handle any complaints in accordance with regulation, the Company's Conduct Policy and Guide to Best Practice.
- Conduct learning, training and assessment exercises in accordance with the individual T&C scheme applicable to you. Identify further areas for development as required.
- Achieve and maintain a high level of customer service and promote exceptional customer care standards at all times.
- Develop and maintain a professional working relationship with all clients and ensure expert advice in all areas of business.
- Liaising with the Account Handler when applicable

## Key Performance Indicators:

- Ensure all Key Performance Indicators are achieved (new business, renewals, cross selling, renewal/retention ratio and overall profitability) and are attained compliantly with FCA regulation.

## Compliance:

- Be aware of the contents of the company's Guides to Best Practice and ensure a full understanding of the following subjects, as a direct relation to the role. Ensure full compliance to the procedures contained within the Guides
  - Commercial business

- Consumer business (if applicable)
  - Consumer Credit
  - Complaints
  - Contract Certainty
  - Errors & Omissions
  - Training and Competence
  - Conflicts of Interest
  - Treating customers fairly
  - Whistle Blowing
  - Financial Crime
  - Data Security and General Data Protection Regulator
  - Record Keeping
- Ensure compliance to the company's employment policies and procedures as contained within the Employee Handbook.
  - Ensure compliance with the Individual Conduct rules and Conduct policies.
  - Ensure all other company practices and procedures are followed and adhered to.
  - Where appropriate take responsibility for meeting the reporting requirements of the FCA
  - Where required ensure staff are adhering to FCA compliance. Perform regular file and sales audits.

### **Treating Customer Fairly:**

- All employees are responsible for engaging with the senior management of the firm in ensuring that our customers are consistently treated fairly and for observing all of the firm's TCF procedures.

### **Professional development:**

- Conduct learning, training and assessment exercises in accordance with the individual T&C scheme applicable to you. Identify further areas for development as required.
- Attend supervision sessions, team and management meetings as appropriate.
- Attend in house training and external training courses as agreed.

### **Insurer/Underwriters:**

- Develop and maintain effective and valuable relationships with insurers and underwriters for the benefit of the company and its clients.
- Comply with the administration requirement of any given insurer.
- Assimilate all company literature circulated by the firm or its agencies.

### **Security:**

- Ensure personal data (client and employee) is secure, held and properly utilised in accordance with the principles of the Data Protection Act (2018) and Company policies.
- Work at all times within strict confidentiality guidelines and the principals of the Data Protection Act (2018) and Company policies.
- Report any potential breaches, including weaknesses in current systems.

### **Administration:**

- Prioritise all client communication and ensure it is actioned in a timely way and in accordance with company procedures.
- Maintain all computer and paper files in accordance with company standards (which should be fully compliant with FCA).

## General:

- Ensure the Health and Safety manual is followed and the office is kept clear and presentable, clear of obstructions at all times, ensuring that all deliveries, parcels, post and messages are given to the appropriate person promptly.
- Undertake any other reasonable duties as directed by your line manager.

# The person

## Experience

- Extensive knowledge of most commercial products
- Previous experience working as an Account Executive role or Senior Account Handler role in a similar broking environment
- Experience of dealing with clients at face to face meetings and over the telephone
- Building strong and sustainable working relationships



## Skills, abilities and knowledge

- Proven track record in sales and achieving growth in commercial insurance
- Confident and expert communicator
- Self managing and ability to organise own workload
- Effective diary management
- Experience of delegating work to/supervising an Account Handler

## Values and personal qualities

- Satisfy all pre-employment checks required for the role including criminal records and credit check.
- Evidence of CPD records
- Willingness to work towards Cert CII

### **Safeguarding rules – yellow card**

We are a youth organisation who takes safeguarding seriously. The post holder agrees to comply at all times with the safeguarding rules as set out on The Scout Association's yellow card, [which can be found here](#). This is shared with young people and carers, as well as employees, so everyone knows our rules of engagement.

In order to comply, stringent vetting procedures take place including checking against an internal database to assess suitability and also Basic/Enhanced DBS checks as required.

### **GDPR and data protection**

The post holder hereby agrees not to disclose any confidential or sensitive information to a third party or outside organisation except where required to do so by law and to adhere to our Data Protection and GDPR policies

### **Health and safety**

The post holder agrees to abide by The Scout Association's Health and Safety principles and code of conduct and to take all reasonable steps to ensure both their own safety in the work place as well as that of their colleagues.

### **Equal opportunities**

The Post holder agrees to promote and uphold the principles of equal opportunities in accordance with The Scout Association's Equal Opportunities Statement and all related policies.



# Benefits

- **Holiday Entitlement:** 25 days per year plus bank holidays. This increases after two years service to 28 days and after five years to 32 days.
- **Additional Holidays:** We operate an office closure during the Christmas and New Year holiday period that provides up to an additional 3 days of extra leave.
- **London Weighting:** In addition to a competitive salary we also provide London weighting to staff if located inner/outer London.

## Looking after your health and wellbeing

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### Simply Health Scheme

You will have access to a medical scheme to help you with the cost of your everyday healthcare fully funded by the Association such as optical, dental and many more. You will also get access to the Gym discount, family days out discount and online health risk assessment.

### Sickness absence

We pay sickness above the statutory minimum requirement.

(Above benefits apply to employees upon completion of three months in their role unless otherwise stated)

## Looking after your future

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### Generous Pension Scheme

We are committed to providing our staff with a best work place pension scheme that is highly competitive in the third sector. For all employees, the Association has a Group Personal Pension Plan with the Scottish Widows.. This plan allows employees to contribute a minimum of 2% of their gross salary up to the maximum allowed within HMRC limits. The Association will contribute twice your contribution, up to a maximum of 10% of gross salary. Employees can benefit further by saving your own and the The Scout Association's National Insurance contribution that is paid into your pension pot.

### Life Assurance

All employees are covered by a scheme which pays four times the basic salary in the event of death in service.

## Getting to and from work

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### Car parking

All sites offer free car parking to employees.

### Minibus Service (Gilwell Park)

A minibus service is provided which collects colleagues from Chingford Station. This service also drops colleagues off to the same location. This service operates through the day and is more frequent at the start and end of the day.

### Cycle to Work scheme

This scheme is a form of salary sacrifice which enables employees to purchase a bicycle through the Government's Cycle to Work Scheme and can save you up to 42% on the retail value (depending on the employees tax bracket).

## We are proud to be a family friendly employer

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### Personal Days

Up to four personal days paid leave a year.

### Maternity/Paternity Leave

We pay maternity leave above the statutory minimum requirement.

### Childcare Vouchers

This scheme is a form of salary sacrifice, enabling employees to purchase childcare vouchers.

### Start and finish time

Employees can apply for some flexibility on their start and finish times of work.

## Making your money go that little bit further

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### Scout Store purchases

Employees can make purchases from Scout Store with a discount of 25% on certain items, excluding uniforms.

### Online Benefits Portal

Our online benefits portal allows you to tailor make your own benefits package.

## Developing yourself and others

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### Study and volunteer leave

Special leave includes paid leave for volunteering and study leave.



# How to apply

Before making an application please ensure that you have read the [Recruitment and Selection Policy](#).

Please submit an application via the apply link on [our jobs page](#).

In order for us to monitor the application of our [Equal Opportunities Policy](#), we would be grateful if you would also complete the Recruitment Monitoring questions on the Application Form.

**Closing date for applications – Wednesday 16 February 2022, 11:59 pm.**

**Interviews will be held late on February 2022.**

If you would to discuss the role in more detail, please contact our [Recruitment Team](#)



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Gold  
Until 2022

