

Associate Broker

Job Title: Associate Broker

Location: Bristol

Salary: £25,000 – £30,000

The Company

Checkmate is an insurance intermediary focused on the residential construction industry throughout the UK. The business predominantly sells 10-year structural defects insurance (structural warranties) to developers, builders and contractors, sourcing the most appropriate level of cover from a panel of providers, ultimately providing greater choice and transparency to the customer.

Role Overview

The Associate Broker supports Producing Brokers in driving new business opportunities, managing client relationships, and expanding revenue across multiple product lines. This is an entry-level, sales-focused role designed for individuals looking to build a career in brokerage, sales, or financial/insurance services. The position combines lead generation, client engagement, and cross-selling support, while providing exposure to the full sales lifecycle.

Key Responsibilities

Lead Generation & Pipeline Development

- Identify and research prospective clients through market analysis, networking, and outreach
- Generate qualified leads via cold calling, email, and social selling
- Maintain accurate CRM records and support targeted business development campaigns

Sales Support & Client Engagement

- Support Producing Brokers with client meetings, pitches, and presentations
- Assist in preparing proposals, quotes, and marketing materials
- Participate in meetings, track follow-ups, and coordinate cross-product introductions

Cross-Selling & Business Development

- Identify opportunities to expand services within existing clients
- Collaborate with internal teams to deliver multi-line solutions aligned to client needs

www.checkmate-warranty.co.uk

Checkmate is a trading style of Exance Services Limited, which is authorised and regulated by the Financial Conduct Authority under firm registration number 300804.

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Relationship Management

- Build and maintain strong client relationships
- Act as a key contact for inquiries and ensure responsive, professional communication

Market Research & Insights

- Monitor market trends, competitor activity, and industry developments
- Provide insights to support strategic sales decisions and identify new growth areas

General Sales Responsibilities

- Meet activity targets and maintain accurate records of sales activity
- Develop strong product knowledge across all offerings
- Collaborate cross-functionally and support sales administration and execution
- Uphold company values, compliance, and regulatory standards
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Skills & Qualifications

- Bachelor's degree or equivalent experience (preferred but not always required)
- Strong communication and interpersonal skills
- Highly motivated with a results-driven mindset
- Ability to manage multiple tasks and prioritise effectively
- Comfortable with outreach, networking, and client-facing activities
- Basic understanding of sales principles and customer relationship management
- Proficiency in Microsoft Office and CRM systems

Key Competencies

- Resilience and persistence
- Commercial awareness
- Relationship-building skills
- Attention to detail
- Team collaboration
- Adaptability and willingness to learn

Career Development

This role provides a clear pathway toward becoming a Producing Broker, with opportunities to take on increasing responsibility in client management, revenue generation, and independent deal execution.

Performance Metrics

- Lead generation volume and quality
- Conversion rates from prospect to client
- Contribution to revenue and cross-selling success
- Activity levels (calls, meetings, outreach)
- Client satisfaction and retention support

Uncapped earnings potential with commissions payable quarterly.