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OPPORTUNITY PROFILE **CHIEF EXECUTIVE OFFICER**

LOCATION: INTERIOR BC (FLEXIBLE)

kis Kootenay
Insurance
Services Ltd.

the right people

KOOTENAY INSURANCE SERVICES | CHIEF EXECUTIVE OFFICER

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THE ORGANIZATION

KOOTENAY INSURANCE SERVICES

Kootenay Insurance Services Ltd. is an independent insurance brokerage with decades of experience serving communities throughout the Kootenay and Okanagan regions of British Columbia. Known for its strong local presence and community connections, the company has grown into a trusted provider of personal and commercial insurance solutions.

The brokerage offers a wide range of insurance products designed to meet the diverse needs of its clients. These include home, auto, business, recreational, and travel insurance, along with other specialty coverages. As an independent broker, Kootenay Insurance works with multiple insurers, giving clients access to competitive options and tailored coverage.

Kootenay Insurance Services operates multiple offices across the region, making its services accessible to residents and businesses in several communities. Its team of advisors is dedicated to providing personalized support, ensuring clients receive guidance that reflects both their circumstances and the realities of the local market.

The company is widely recognized for its friendly service, professionalism, and commitment to supporting clients throughout the insurance process, including during claims. With its customer-focused approach and strong regional footprint, Kootenay Insurance Services continues to be a reliable and valued partner for individuals and organizations across the Kootenays and beyond.

To learn more, please visit Kootenay Insurance Services [website](#)



THE OPPORTUNITY CHIEF EXECUTIVE OFFICER

The CEO of Kootenay Insurance Services provides strategic leadership and overall executive direction for a consortium of Credit Union partners' wholly owned insurance subsidiary, overseeing a multi-branch, geographically dispersed network dedicated to delivering high-quality insurance products and services. The position brings visionary thinking and strong leadership to engage people, mobilize resources, and set a clear, compelling direction that drives organizational performance and long-term success.

The CEO leads the development, execution, and continuous enhancement of integrated sales and business strategies, working closely with regional and branch leaders to ensure alignment with enterprise goals and market opportunities. The position also oversees the design, implementation, and optimization of operational policies, procedures, technology platforms, and service delivery processes, ensuring consistent standards, operational excellence, and a seamless client experience across the branch network.

The position must champion and direct business growth initiatives, including mergers, acquisitions, strategic partnerships, and the onboarding of new branches. As the organization's senior insurance expert, advises the Board on market trends, operational risks, and long-term strategic priorities, contributing to sustainable growth, competitive positioning, and the overall strength of the Credit Union system.



Major Duties and Accountabilities

Subsidiary/Agency Management and Operation

- Provides overall leadership to the insurance subsidiary, and manages the operation of a large, multi-branch and geographically diverse network engaged in the effective delivery of insurance products and services to clients. Establishes, implements, monitors and enhances sales and business strategies in consultation with regional and branch managers, and ensures operations are aligned with subsidiary goals and objectives;
- Retains accountability for achieving and exceeding sales, business development, financial success and other key performance indicators;
- In consultation with executive/senior management team and internal/external subject matter experts, oversees the design, development, implementation and quality of operational policies, procedures, technology applications and other processes affecting subsidiary operation to ensure consistency across the branch network. Identifies continuous improvement opportunities and pursues their development. Incorporates best practices where applicable.

People Leadership, Engagement and Organizational Culture

- Sets organizational tone and maintains a culture consistent with the mission, vision and values determined by the Board through the development and enhancement of an organizational structure and job design which best delivers a quality client/member experience, while adhering to standards of efficiency and effectiveness. Pursues employee engagement through involvement in initiatives at the branch and department levels, facilitates and models open communication and collegial decision making, and monitors engagement levels through informal and formal feedback mechanisms to ensure



continuing organizational wellbeing;

- Provides leadership, coaching and mentoring to direct reports by providing ongoing performance feedback and managing individual and group performance through established performance management programs. Selects new executives and senior managers and oversees orientation and continuous learning activities. Conducts formal performance appraisals for direct reports and oversees salary administration processes to ensure adherence with established compensation policies and collective agreement provisions. Consults with executives and senior managers in employee relations and disciplinary issues, and provides advice, support and policy interpretation to mitigate risk;
- Oversees collective bargaining and provides advice and guidance to the management bargaining committee, either through active committee membership or through regular communication and consultation. Builds ongoing, positive relationships with union business agents and representatives, and promotes a mutual gains approach when participating in problem resolution at the operational level.

Financial, Regulatory and Risk Management

- Oversees the production of monthly, quarterly and annual financial statements by Finance, Audit and Operations Specialists, and monitors financial performance on an ongoing basis to ensure sustainability and to identify strengths and challenges. Implements corrective action where required to ensure adherence to approved budgets, regulatory requirements and internal/external audit recommendations. Reports regularly to the Board on key performance indicators, and provides subject matter expertise to Board members on industry-specific issues and concerns;
- Leads the development and implementation of annual capital and operating budgets, and makes budget presentations to the Board.



Long Term Planning, Business Growth and Product Development

- Coordinates annual strategic planning sessions in consultation with the Board Chair, and elicits feedback from all levels of operation within the subsidiary on organizational goals, objectives and initiatives. Communicates results and oversees the incorporation of Board planning decisions and outcomes into all aspects of subsidiary operation;
- Develops and maintains supplier relationships at the strategic and tactical levels and ensures suppliers meet subsidiary and credit union standards. Monitors product and service offerings on an ongoing basis and leads the development and implementation of new products and services to capitalize on market opportunities, supplier offerings or other factors;
- In consultation with insurance and credit union teams, develops inter-organizational referral systems to enhance cross selling opportunities and promote relationship building between strategic partners;
- Spearheads and leads business growth and development initiatives including mergers and acquisitions, and the onboarding of new branches. Conducts due diligence research into areas involving overall subsidiary operation to identify strengths, weaknesses, opportunities and threats associated with potential amalgamation with other insurance businesses. Consults regularly with Executive and Senior Management Team members involved in other specialized due diligence activities for areas such as technology, administration and employee relations. Prepares analyses, technical reports and summaries of due diligence results, and makes recommendations to the Board on risks and mitigation strategies;
- Oversees the design, development and implementation of the subsidiary marketing plan across the branch network and consults regularly with marketing specialists to ensure the plan is meeting or exceeding expectations, and to monitor successes and challenges. Facilitates branch participation in local initiatives and organization-wide branding and promotional activities to enhance engagement.



Customer/Client/Member Experience and Relationships

- Oversees the execution of regular and ad hoc client/member feedback processes such as surveys, focus groups and website utilization, and incorporates trends into all planning activities.

Industry Representation, Community Involvement and Corporate Citizenship

- Establishes and maintains liaison with regulatory bodies governing industry operation, such as ICBC and professional brokers associations, and interprets legislation and regulations affecting the subsidiary. Actively participates in industry interest groups, underwriter initiatives and professional associations in both leadership and support capacities to ensure active representation of the subsidiary's interests and to keep abreast of trends at both national and industry levels;
- Promotes the organization within the communities served by actively sponsoring, participating in and supporting community events. Seeks opportunities to promote community awareness of subsidiary operation, and develops new and lasting business contacts.

THE PERSON

Qualifications and Competencies

- Formal education in Business Administration, Operations Management or similar discipline from a recognized educational institution;
- Chartered Insurance Professional (CIP) designation through the Insurance Institute of Canada;
- Level 3 General Insurance Agent License or CAIB designation, in accordance with Insurance Council of BC's education and experience requirements) PLUS eligibility to become the Agency's Nominee and,
- A minimum of 10 years experience in an insurance environment, including at least 3 years as a Personal Lines and/or Commercial Insurance Broker (Level 2 General Insurance Agent License) and 5 years in a senior leadership position at the Regional Manager level or above.
- An equivalent combination of education and experience will be considered.



Additional required knowledge, skills and abilities

- Working knowledge of insurance system applications (such as EPIC, Applied Rating, ICBC systems) and office automation software such as Word, Excel and Outlook;
- Candidates must also demonstrate proficiency in the following:
 - Proven leadership skills, and the ability to motivate a team of senior managers;
 - Proven performance coaching and intervention skills;
 - Knowledge of strategic and tactical planning;
 - Ability to leverage existing industry contacts and relationships into KIS operations;
 - Ability to work with a Board of Directors, and demonstrated understanding of the governance model associated with cooperative organizations;
 - Ability to work independently with little functional guidance;
 - Ability to communicate positively in a sales and service environment, both verbally and in writing
 - Ability to provide service-oriented solutions to customers and staff;
 - Ability to organize work to meet deadlines within an environment of constantly changing priorities.
- Candidates will undergo a criminal records check prior to selection and be bondable;
- A valid BC Drivers license and access to a licensed motor vehicle in safe operating condition is also required;
- Successful applicants are required to meet annual continuing education requirements to maintain their licensing level.



Competencies and Personal Characteristics

Leadership – Achieves desired organizational results by encouraging and supporting the contribution of others; a proactive and positive team player who acts with a sense of urgency and leads by example; sets and communicates clear goals.

Accountable – Holds self and others accountable for responsibilities; focuses on results and measuring attainment of outcomes in a business focus.

Strategic – Develops a plan in support of organizational strategic direction. Demonstrates an understanding of the link between one's job responsibilities and overall organizational goals.

Integrity and Honesty – Demonstrates a resolute commitment to and respect for the spirit behind the rules and core values of the organization, setting an example of professionalism and ethical propriety.

Influential and Collaborative – Has an open and consistent approach to working with others and possesses strong interpersonal skills, with the ability to build relationships and develop/maintain partnerships, obtaining stakeholder agreement.

Creativity and Innovation – Develops new insights into situations; questions conventional approaches; encourages new ideas; designs and implements new or cutting-edge programs/processes.

Effective Working Relationships – Treats colleagues, and stakeholders with respect; resolves conflicts in a timely manner, negotiates effectively, and provides effective feedback to colleagues/employees.

Communication – Clearly presents written and verbal information; writes with clarity and purpose; communicates effectively in both positive and negative circumstances; listens well.

People Development – Fosters learning and development of others through coaching, managing performance and mentoring; has a genuine desire to develop others and help them succeed; formally and informally recognizes deserving staff and colleagues.

Partner Group Focused – Anticipates and attends to the needs of internal and external partner groups of the organization; keeps stakeholder interests in the forefront.



COMPENSATION

A competitive compensation package will be provided including a target base salary of \$140,000 plus bonus and excellent benefits. Further details will be discussed in a personal interview.

FOR INFORMATION PLEASE CONTACT:

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