

## **Vice-President - National Sales**

Halpenny Insurance Brokers

*with Windley Ely Integration Focus*

**Companies:** Halpenny Group (P&C Insurance Broker & Group Benefits) & Windley Ely (Claims Management)

**Location:** Ottawa or Toronto (primary) | Travel up to 25% across national offices

**Reports To:** Chief Executive Officer / Executive Leadership

**Employment Type:** Full-Time, Permanent

**Compensation:** Base Salary (\$175,000 – \$225,000) + Performance Incentive

### **About Halpenny Group & Windley Ely**

Halpenny Insurance Brokers is one of Ontario's leading independent commercial P&C and group benefits brokers, with offices in Ottawa and Toronto. Windley Ely is a national claims management company headquartered in London, ON, with branches in Calgary, Vancouver, Montreal, and Ottawa. Under shared ownership, these two firms represent a powerful combination of brokerage, benefits, and claims expertise — with significant untapped revenue potential across a combined client base of approximately 205 professionals nationwide.

### **Position Summary**

The Vice-President - National Sales is the senior revenue leader for Halpenny Group and Windley Ely, responsible for driving organic growth through sales strategy, producer performance, and cross-firm collaboration. This leader is both a strategist and an active closer — equally comfortable setting national direction and sitting across from a CFO to close a complex, multi-line deal. The role exists to turn the Halpenny + Windley Ely combination into a cross-selling engine: breaking silos between P&C, group benefits, and claims/risk consulting, monetizing the existing client base across both firms, and building repeatable systems for multi-line client penetration.

### **Key Responsibilities**

#### **Build the Cross-Sell Engine (Primary Focus)**

- Identify and prioritize cross-sell opportunities: Halpenny clients → Windley Ely claims/disability/WCB services; Windley Ely clients → Halpenny P&C and group benefits
- Design cross-sell playbooks by segment: mid-market, large accounts, and industry verticals
- Implement referral protocols, joint account planning processes, and shared pipeline reporting across both firms

- Build strong alignment with commercial lines, group benefits, and claims/risk practices to leverage the full combined value proposition

## **Lead National Sales Strategy**

- Own revenue growth across new business, cross-sell, and key account expansion
- Set, monitor, and deliver on annual sales targets for new business, retention, and cross-sell activity by region and product line
- Utilize sales analytics, pipeline metrics, and dashboards to track progress, identify opportunities, and implement course corrections
- Contribute to business planning, budgeting, and sales reviews in partnership with leadership

## **Lead & Develop Producers and Business Development Teams**

- Provide direct leadership of Account Executives (producers) and Business Development/hunter roles
- Support producer efforts throughout the full sales cycle — developing, qualifying, strategizing, and winning new business opportunities
- Join producers at early-stage prospect meetings, participate in sales negotiations, and attend client presentations as needed
- Develop creative solutions on new business opportunities; articulate Halpenny and Windley Ely differentiators to turn prospects into clients
- Attract, develop, and retain top sales talent to meet future growth needs across both Ottawa and Toronto markets
- Foster a culture of accountability and recognition that rewards excellence, collaboration, and continuous improvement
- Shift producer mindset from “my book” to firm-wide client value

## **Institutionalize Cross-Firm Collaboration**

- Break down cultural barriers and compensation misalignment between Halpenny and Windley Ely teams
- Introduce joint sales calls, shared incentive structures, and cross-training programs across both firms
- Lead the change management required to make cross-sell a standard operating practice, not an afterthought

## **Drive Client & Market Engagement**

- Build and maintain strong relationships with key clients, carrier partners, and community leaders
- Represent the Halpenny + Windley Ely brand externally through leadership in industry associations and client events
- Champion a consultative, risk-advisory sales approach across all producer teams
- Personally engage in top-tier, multi-line opportunities at the CFO, CHRO, and Risk Manager level

## **Create Visibility & Accountability**

- Implement cross-sell pipeline tracking, share-of-wallet reporting, and producer performance dashboards
- Establish KPIs tied to cross-sell outcomes — not just gross written premium

## **Key Success Metrics**

- % of clients with 2+ product/service lines across both firms
- Cross-sell revenue growth year-over-year
- Revenue per client (share of wallet trend)
- Producer cross-sell activity rates and new business conversion
- Retention and expansion of top accounts

## **Qualifications**

### **Required:**

- 10–15+ years in insurance brokerage, group benefits consulting, or risk advisory
- Minimum 5 years in a senior sales leadership role with direct producer management responsibility
- Proven success supporting the full sales cycle — qualifying, strategizing, and closing complex multi-line opportunities
- Demonstrated ability to attract, develop, and retain top producer talent
- Proven success in post-merger, multi-division, or integrated service environments
- Deep knowledge of at least one: commercial P&C, group benefits, or claims/disability management
- Strong understanding of commercial insurance products, carrier markets, and competitive dynamics
- Entrepreneurial mindset with the ability to balance strategy, execution, and operational discipline
- Bachelor's degree in Business, Finance, or a related field (advanced degree an asset)

**Credentials (Preferred):**

- P&C: CIP, CAIB, or FCIP
- Benefits: CEBS or GBA
- Functional bilingualism in French and English an asset

**What We Offer**

Halpenny Group and Windley Ely are proud to offer:

- Competitive base salary (\$175,000 – \$225,000) with performance-based incentive
- Comprehensive group benefits plan including health, dental, wellness savings account, and Group RRSP
- A genuinely unique mandate — building a cross-sell revenue engine across two established Canadian firms
- Direct access to ownership with the authority and resources to execute your vision
- Professional development support including designation sponsorship (CIP, FCIP, CAIB, CHRL)
- Hybrid work flexibility across Ottawa and Toronto offices

**How to Apply**

Qualified candidates are invited to submit a resume and cover letter in confidence to [careers@halpenny.com](mailto:careers@halpenny.com) with the subject line: “Vice-President - National Sales”. We thank all applicants for their interest; only candidates selected for an interview will be contacted. Halpenny Group and Windley Ely are committed to equity, diversity, and inclusion. Accommodations are available on request throughout the selection process.