



Account Manager – Position Description

Reports to: Operations Manager

Position Summary:

Assists Producers on assigned accounts, managing key processes that serve clients and undertaking the client-facing and internal activities related to these processes.

Role/Responsibility

- Act as a team member in assisting the Producers in the selling and maintenance of Commercial Lines accounts.
- Assist Producers with new business marketing process. This may include completing applications, marketing the submissions, carrier online rating, creating proposals, new policy set up, billings and binders. Communicate with prospects for any missing information.
- Responsible for the renewal process on existing accounts. This may include producing summaries of insurance, customer visits, completing applications, marketing, proposals, billings and binders. Communicate with clients for any missing information.
- Account Development. In addition to new business, familiarize oneself with other lines the agency could write. Work with other department personnel to accomplish this.
- Other duties may include certificates of insurance, binders, requesting endorsements, follow up on underwriting requests from companies, follow up on service requests from customers (billing questions, cancellation requests, auto ID cards, etc), quality checking policies and endorsements.
- Responsible for collection of agency bill premiums for policies, endorsements and audits.
- Use the Applied EPIC system to maintain a current suspense system, by use of Activities.
- Use the Applied EPIC system to document all transactions and communications.
- Utilize company interface programs as respects rating, policy and endorsement processing. Attend training sessions, if needed, to keep current on these programs.
- Assist in training other personnel if needed.
- Perform additional assigned duties as requested.
- Attend continuing education classes to maintain Property & Casualty license.
- Maintain a professional demeanor and follow the Code of Ethics as set forth by the agency.
- Work toward CIC designation within 3 years of hire date.

Qualification Requirement

- Possess a High School diploma or equivalent

- Hold current Property and Casualty Producer license
- Have 2 years or more of insurance or business-related experience
- Possess a supportive and responsive manner with internal and external customers
- Have ability to perform multiple tasks in complex working environment accurately and efficiently
- Possess above average computer knowledge and skills
- Have knowledge and experience necessary for independent decision-making ability
- Set priorities and manage work flow independently to ensure efficient, timely and accurate processing of transactions and other responsibilities
- Interact with others effectively by utilizing good communication skills, cooperating purposefully and providing information and guidance, as needed, to achieve the business goals of the company
- Contribute to a positive work environment
- Apply solid knowledge of major insurance coverages
- Act with responsiveness, urgency, and professionalism in all client matters
- Consistently report to work on time prepared to perform duties of position
- Accept accountability for your quality of work and the work of the team

Physical Demands:

- Able to sit for long periods of time, use repetitive small motor activity, use hands and fingers, and reach with hands and arms.
- Occasional lifting up to 20 pounds

Date: _____

Employee: _____