

Job Title: Account Manager
Employment Status: Full Time
Classification: Non-Exempt

Department: Personal Lines
Benefit Eligibility: Full

SUMMARY

Provides leadership, guidance, and support to clients, co-workers, companies and those in our community by obtaining, maintaining, expanding and servicing client accounts. The primary responsibility is to assist the Agency in maintaining high account retention by providing excellent customer service for current and prospective clients.

To perform this job successfully, an individual must be able to perform each responsibility satisfactorily, which is the Agency's responsibility to determine. The requirements listed below are representative of the knowledge, skill, and/or ability to be successful.

ESSENTIAL DUTIES/RESPONSIBILITIES (include but are not limited to the following)

- Accept all phone calls, welcome all walk-in clients, and provide back-up support for all co-workers.
- Cross-sell the agency service's additional lines, otherwise refer prospect(s) to appropriate department or Producer.
- Able to manage a proportionate number of mid-level accounts when reviewing your overall book of business.
- Follow Agency procedure manuals for efficient and effective performance.
- Serve as backup to claims department taking claim reports, answer questions on existing claims, and refer any issues to the Claims Loss Control Coordinator or Producer.
- Maintain and update electronic client accounts within the Agency Management System.
- Process incoming mail, email, phone and fax requests and inquiries, responding promptly and appropriately.
- Set priorities and manage the workflow to ensure efficient, timely, and accurate processing of transactions and other responsibilities.
- Maintain a cordial and effective relationship with all business contacts including, but not limited to, clients, co-workers, company personnel, and vendors.
- Use available computer programs to best maintain customer accounts and efficiently complete tasks at hand (ex: forms, applications, changes or quotes.).
- Research and stay informed regarding industry information, new product information, legislation, coverage and technology to continuously improve knowledge and performance.
- Interact with others effectively by utilizing good communications skills, contributing to a positive and productive work environment, cooperating purposefully and providing information and guidance.
- Adhere to our various Companies' guidelines while remaining within our Agency's authority.
- Receive, document, and process all insured requests for service and act as the liaison in reviewing, documenting, and processing all carrier requests.
- Inform and educate clients about coverage, exclusions, and exposures.
- Recommend process improvements for increased efficiencies
- Display and promote company values
- Regular attendance
- Assist or complete all other tasks as directed by agency management and performing other duties as required.

- Abide by the Employee Handbook, the Code of Conduct, and the Code of Ethics.

EDUCATION AND/OR EXPERIENCE

- A high school diploma or the equivalent is preferred
- A minimum of five years' experience in a professional environment preferred
- Commercial, Personal, Life, and/or Health Lines License is required
- Ability to maintain appointment by all carriers required.
- Proficiently navigate commonly used computer systems and software (i.e. Word, Excel, PowerPoint, etc.) with ability to learn new systems and software quickly required
- Knowledge of insurance markets and reference to markets is required
- Adequate knowledge of rating procedures, coverages and industry operations to effectively manage and maintain client accounts is preferred.

KNOWLEDGE, SKILLS AND ABILITIES

- Relay complex or abstract information and/or instruction in a descriptive and understandable fashion in both written and verbal forms
- Receive and interpret complex information which includes actively listening for total comprehension and asking questions that enhance the understanding of a certain topic
- Moderate-level math abilities is required which includes addition, subtraction, multiplication, and division skills with whole numbers, fractions, and decimals.
- Basic-level, reasoning abilities are necessary to understand and follow basic instruction from supervisory positions either by writing or verbally. This person also must meet deadlines and work well with teammates.

PHYSICAL REQUIREMENTS

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Sit an average of 7-8 hours per workday
- Stand an average of one hour per workday
- Walk an average of one hour per workday
- Bend/Stoop – Rarely (1-2 times/day)
- Squat – Rarely (1-2 times/day)
- Reach above shoulder level – Rarely (1-2 times/day)
- Light -Up to 10 lbs of weight carried – Occasionally (1-4 times/hour)
- Light- Up to 10 lbs of weight lifted – Occasionally (1-4 times/hour)
- Hands used for repetitive action: Fine Dexterity (i.e. typing, writing, filing) – Constant (greater than 25 times/hour)

TRAVEL REQUIREMENTS

Travel, up to 100 miles in a given day, is required for this position to maintain the required continuing education and visit other Company offices.

JOB DESCRIPTION ACKNOWLEDGMENT

By signing below, I acknowledge that I have read the Account Manager job description, understand the expectations, and am able to perform the essential duties and responsibilities necessary to successfully perform the job as described with or without reasonable accommodations.

I also understand that the job description may be changed at the discretion of the company at any time and this job description in no way is to be considered a contract of employment, nor does it guarantee my employment for any given period of time.

Name (Print) Date

Signature