

Commercial Lines Account Manager

Job Description

The Account Manager (AM) will provide courteous and professional service to clients, carrier representatives, and other employees. AM will maintain a positive attitude while providing a high level of support to producers in their efforts to obtain, retain, and expand new and existing commercial accounts. AM will work with the support associate to ensure routine policy transactions are processed accurate and promptly.

Essential Duties and Responsibilities:

- Identify opportunities to account round, cross-sell and up-sell other products provided by our agency when appropriate for the client's needs.
- Coordinate with Producer to ensure renewal applications, exposure surveys, reviews, and proposals are conducted in a professional and timely manner.
- Provide support to producer in development of new business opportunities with prospects and existing clients.
- Market accounts, negotiate rates, review company quotes and coverage provided for accuracy and prepares proposals.
- Respond promptly and professionally to the service requests of clients.
- Ensure all policy documents are promptly received from carrier and verify accuracy of coverage.
- Ensure that all transactions are accurately and promptly recorded in TAM for documentation and follow-up purposes.
- Order policies and deliver binders, certificates, endorsements, evidences of coverage and other policy documents to insured promptly after coverage is requested and bound by carrier.
- Provide technical and clerical support to producer to strengthen and maintain positive client relationship.
- Work with carrier underwriters, processing, and other representatives to provide adequate products and fair pricing to clients.
- Establish and maintain a professional and positive attitude and working relationship with other employees, company representatives, and clients.
- Other duties as assigned.

Qualifications:

- Property and Casualty Producer's License; Advanced professional designation highly desirable.
- Excellent communication and interpersonal skills when dealing with clients, third parties, company representatives, and co-workers.
- Knowledgeable about insurance products, state and federal regulations, market conditions, and other relevant industry information.
- Ability to effectively work in a team environment
- Desire and ability to take on responsibility independently, prioritize tasks, and manage deadlines.
- Excellent customer service skills, including courteous telephone and listening skills
- Time management, organization, planning and problem solving skills.
- Detail-oriented and ability to multi-task and prioritize.
- Proficient with Microsoft Office Products
- Proficient in Applied Systems