

## **JOB DESCRIPTION**

**Title:** Commercial Lines Account Manger

**Reports To:** Commercial Lines Unit Leader

### **DESCRIPTION:**

The Account Manager is responsible for the effective management of commercial lines accounts. Working with the Producer/Account Executive, the Account Manager will help assess the risk management needs of prospects and clients and will market new and renewal accounts. An understanding of the insurance marketplace along with building and maintaining strong relationships with our carrier partners is expected.

### **KEY DUTIES AND RESPONSIBILITIES:**

- **Consistent Quality Service to Clients and Customers**
  - Respond to customer requests.
  - Respond to carrier requests.
  - Maintain accurate policy detail for claims department.
  - Respond to accounting discrepancies.
- **Accurate and Timely Processing of:**
  - Billing, reviewing policies, updating detail, processing endorsements, and audits.
  - New and renewal policies invoiced.
  - Policies checked and delivered to customers.
  - Endorsements checked, invoiced, and mailed to customer.
  - Order list reviewed weekly.
  - Audits checks and invoiced.
  - Follow-up on payment of agency billed audits.
- **Marketing: Renewal and New Business**
  - Billing, reviewing policies, updating detail, processing endorsements, and audits.
  - New and renewal policies invoiced.
  - Policies checked and delivered to customers.
  - Endorsements checked, invoiced, and mailed to customer.
  - Order list reviewed weekly.
  - Audits checks and invoiced.
  - Follow-up on payment of agency billed audits.

### **ADDITIONAL RESPONSIBILITIES:**

- **Workflow:** Organizing and orchestrating the efficient operations of the team, including the CSR, so deadlines are met.
  - Use of internal forms such as “Marketing Check List”, “Renewal Updates Form”, and “New/Renewal Check List” during the marketing process.

- Follow document management procedures & proper use of Agency Management System
- Follow-up on payment of agency billed audits.

**QUALIFICATIONS:**

- Maryland State Property & Casualty Producer license.
- Three years of customer service/account management experience.
- Bachelor's degree, AAI, AU, CRIS, or related professional designation preferred.
- Solid understanding of insurance principles.
- A dedicated commitment to the delivery of exceptional customer service.
- Experienced and fluent with insurance carrier rating systems and websites.
- Solid written and verbal communication skills.
- Organization skills to successfully handle multiple tasks.
- Detail oriented to ensure accuracy.
- Excellent listening skills.
- Confident problem solver with focus on resolving customer service issues.
- Superior typing and data entry skills.
- Exceptional computer skills. Ability to navigate various systems, utilize integration tools, proficient in Microsoft Word and Excel, and work in a paperless environment.
- Results oriented, with the capability of meeting deadlines.
- Demonstrated ability to function effectively as part of a team in a sales environment.