

Commercial Lines Account Manager

Job Description:

The primary function of this position is to provide quality service to clients. The Account Manager will be the day-to-day liaison between the insurance company, agent, and their clients.

Daily servicing of clients will include addressing various coverage issues, and handling all the inside service work associated with the clients account, including all endorsement activity, routine coverage questions, problem solving, renewals, checking and binding of policies. The only exceptions are bond and claims related items which are handled by those departments.

Job Duties:

- Build and maintain relationships with clients.
- Provide consistent, accurate, and timely communication to clients through, verbal and written correspondence.
- Inform and educate clients about coverage, exclusions and exposures; document electronic files accordingly.
- Maintain client files in Epic and use Epic for processing all transactions.
- Process daily incoming mail, and phone requests, responding promptly and appropriately.
- Handle cancellations with care, and acts to save accounts (if applicable) and notifies producer.
- Assist with preparing proposals and applications, submit to insured's and carriers (or marketing department); follow up to insure timely responses.
- Provide technical support to Producers (coverage-wise, with proposal, suspense, items etc.) to help clients.
- Assist clients in making appropriate coverage changes; inform and educate clients about coverage's, exclusions, exposures, and audits and document electronic file accordingly.
- Renew and re-market accounts as needed in conjunction with agency standards.
- Maintain client files accurately and consistently documenting conversations, sending confirmations to clients, adhering to all other automation procedures.
- Occasionally accompanies producer on prospect or client meetings.
- Orders and issues binders, certificates, policies, endorsements, and other related items; verifies their accuracy; forwards them to client with appropriate correspondence.
- Reviews audits of policies; verifies accuracy and facilitates corrections, as needed, between client and carrier.
- Determines if agency or direct billing and invoices accordingly. If it's an agency bill account, enter the premium into the system, and forward accounting company invoice for further processing by their department.
- Must update the Epic system accordingly using the Epic guidelines.
- Sets priorities and manages work flow to ensure efficient, timely and accurate processing of transactions and other responsibilities.
- Set up finance contracts with PFS and help negotiate rates when applicable.
- Other duties as assigned.

Position Requirements:

- 5 or more years experience as a Commercial Lines Account Manager, and currently hold a P&C license.
- Understanding of commercial insurance underwriting, coverage & rate analysis.
- Knowledge of insurance coverage's and an ability to communicate this clearly to clients and underwriters.
- Keeps informed regarding industry information, and new product information.
- Strong written and verbal communication skills.
- Ability to organize, prioritize and self-manage work load.
- Computer literate with experience using Word and Excel.
- Ability to work in a team environment, with a positive attitude, and willingness to help others.
- Able to work under pressure and time constraints in a fast paced environment with significant telephone and personal interruptions.
- Good attendance.