

Commercial Account Manager

Job Description:

The primary function of this position is to provide quality service to clients. The Commercial Lines 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. This is an exempt position and reports to the Commercial Lines Supervisor.

Job Duties:

- Build and maintain relationships with clients ensuring high customer satisfaction.
- 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, phone and email requests, responding promptly and appropriately.
- Handle cancellations with care, and acts with the producer to save accounts (if applicable).
- Assist with preparing proposals and applications. The filling out of applications is the responsibility of the producer, unless the team has agreed to other arrangements. Once the applications are done the account manager will submit to the carrier/carriers.
- Provide technical support to Producers when necessary.
- 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.
- Update the Epic system accordingly using the Epic Policies and Procedures.
- Sets priorities and manage work flow to ensure efficient, timely and accurate processing of transactions and other responsibilities.
- Set up finance contracts with IPFS and help negotiate rates when applicable.
- Other duties as assigned relevant to the position.

Position Requirements & Job Conditions:

- Minimum 5 years' experience as a Commercial Lines Account Manager, and currently hold a P&C license.
- High School Diploma, GED, or equivalency of experience.
- 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.
- Ability to work in a paperless environment.
- Able to work under pressure and time constraints in a fast-paced environment with significant telephone and personal interruptions.
- Able to sit for long periods of time, with significant keyboarding required.
- Can work independently with little supervision
- Lifting up to 20 pounds
- Good attendance.