

POSITION DESCRIPTION

Position Title: Junior Commercial Account Manager

Department: Commercial Lines

Reports To: Commercial Account Manager

FLSA Status: Exempt

SUMMARY

Assist account managers in the handling and processing of new and renewal commercial lines business. **This position offers room for advancement.**

ESSENTIAL RESPONSIBILITIES

- **Work as part of a team to achieve the team's account retention and production goals:**
 - Provide primary assistance/support to account managers, and producer
 - Communicate effectively with team members, company personnel and clients
 - Develop positive working relationships with team members, company personnel and clients
 - Participate in the bi-weekly team meetings with the producer and team members
 - Adherence to Proactive Account Management Timeline and deadlines

- **Proactive Account Management, including, but not limited to:**
 - **Pre-renewal:**
 - Prepare pre-renewal document and summaries (historical premiums, claims analysis, and others) needed for the client/producer meeting
 - Prepare all applications (renewal, marketing and new business)
 - Review client's experience modification for errors

 - **Proposal:**
 - Prepare proposal document
 - Prepare proposal summaries (OVC, LVP, historical, and any other account specific summary as needed)
 - Prepare client invoices, issue renewal certificates, issue ID cards, etc...

 - **Audits:**
 - Confirm audit(s) have been scheduled/completed
 - Create comparison summaries for the client and account manager

 - **Policy Delivery:**
 - Complete coverage and policy form review for all policies within the team's deadline
 - Order all necessary corrections from the carrier, & prepare policy book for delivery

 - **Mid Year:**
 - Prepare experience modification projection for the upcoming renewal

 - **Service:**
 - **Do the right thing, with a sense of urgency while exceeding expectations:**
 - Process all requests for certificates of insurance within 24 hours of request. This process includes reviewing with the account manager the contract and policy for potential coverage for gaps.
 - Handle all endorsement requests as requested by account managers
 - Invoice all premium bearing transactions by the end of the month
 - Maintain agency system suspense items in a timely manner.
 - Update and maintain current account information in the agency automation system.

 - **Education:**
 - Keep informed on industry, coverage and form changes in an effort to continuously improve insurance knowledge.
 - Develop position expertise through participation in select continuing education webinars/courses
 - Participate in quarterly CAM meetings

QUALIFICATIONS

Candidates should have college degree and previous P&C insurance experience; however, appropriate experience may be substituted for the education requirement. Candidates should be proficient with use of Microsoft Word, Excel, and Outlook (previous experience with Applied Systems agency management software would be considered a plus.) Candidates must hold active agents license or must be prepared to obtain a license within 30 days of hiring.