Title: Personal Lines Account Manager

Description of Responsibilities:

The Account Manager is responsible for the growth and management of personal lines accounts, as well as mentoring our less experienced team members. An understanding of the marketplace along with building and maintaining strong relationships with our insurance carrier partners is expected.

Key Duties & Accountabilities:

Develop New Business
Meet monthly and annual production goals.
Cross Sell when talking to existing accounts. Meet annual goal for number of Additional Policies on Existing Accounts.
Prospect for New Business: 1) Ex-lists 2) Cross-Sell Marketing – minimum 20 per month 3) Epic Prospect List including lost accounts and accounts not written 4) Asking Customers for Referrals 5) Asking Producers for referrals 6) Cold calling
Follow up with client/prospect within 5 days of giving them a quote for new business.
Manage Account and Policy Retention
Strives to develop good relationship with all clients by getting to know them on a more personal level.
Strives to be a problem solver for all client issues.
Reviews accounts prior to renewal and proactively offers coverage recommendations to clients.
Asks client about other lines of business we are not currently writing.
Consistent, Quality Service to Clients/Customers
Answers phone promptly with warm, friendly and helpful tone. Uses proper phone greeting. Willingly takes overflow phone calls when needed.
Returns emails and phone calls promptly. Follows department procedures for returning emails and phone calls.
Assists client with reporting claim and is an advocate for helping them resolve any issues with the claim process.
Provides accurate proposals, quotes and applications to client/prospect.
Checks all correspondence (emails, letters, attachments) for accuracy before sending to the client/prospect.
Daily review of Open Activities.
Maintains customer contact information. Phone # and email address are checked when working with client. Accurately sets up new customer accounts and policies.

Establish and maintain good working relationships with our insurance carriers
Treats underwriter and all carrier personnel with respect and understands the importance of maintaining a good relationship.
Knows carriers products and procedures and billing options.
Knows carrier website and is able to efficiently process policy changes and quotes on their system, and help customers with billing issues and payments.
Understands current market conditions and carrier appetite for new business.
Complete and accurate applications and forms.
Operation of the Team/Mentoring the CSR
Is a team player. Offers assistance to all team members. Is approachable and patient.
Is a positive role model with both actions and words.
Coaches and trains the CSR in order to encourage and promote professional development and advancement in the organization - Reports in depth training needs to Sr. CSR.
Gives new business leads to correct team member. Checks Epic and New Business Leads List before assigning lead. Follows procedures for assigning leads.

Qualifications:

- High School diploma.
- 3 years of previous personal lines insurance experience.
- Valid P & C license.
- Strong customer service focus.
- Solid written and verbal communication skills.
- Organizational skills to successfully handle multiple tasks.
- Attention to detail.
- Excellent listening skills.
- Demonstrated problem solving skills to resolve customer service issues.
- Good typing and data entry skills.
- Solid computer skills. The ability to navigate various systems, and use Microsoft Word and Excel.
- Must be a team player.
- Positive attitude.