

## **Personal Lines Account Manager - Major Job Accountabilities**

Must hold P&C license and have 3 years prior Personal Lines experience.

### **I. Develop new business. Meet monthly and yearly goal.**

- A. Cross Selling Existing Accounts
- B. Asking for referrals
- C. Prospecting
  - Ex lists
  - Lost Accounts
  - Cold calling

### **II. Manage account and policy retention.**

- A. Provide quality customer service.
- B. Develop good relationship with all clients.
- C. Strives to be a problem solver for all clients
- D. Reviews accounts prior to renewal and identifies and offers coverage recommendations to the client.

### **III. Establish and maintain good working relationships with our carriers.**

- A. Complete and accurate applications.
- B. Knowledge of carrier's procedures, products and appetite.
- C. Use of interface and rating software.
- D. Prompt response to request for information.

### **IV. Help with training, development, and mentoring of CSRs and new Account Managers.**

- A. Facilitates learning and professional development by providing appropriate coaching and support.
- B. Builds rapport.
- C. Is approachable, tolerant and patient.
- D. Sets a positive example in actions and words.

### **V. Provide quality claims service.**

- A. Accurate claim detail in computer.
- B. Prompt response to requests for information from the customer, adjuster, or appraiser.