



JOB TITLE: Account Manager
(Personal Lines/Private Client)
FLSA STATUS: Non-Exempt
DATE: January 2019
REPORTS TO: Director of Operations

ORGANIZATIONAL MISSION

Our employee owners build collaborative relationships to protect people, assets, and income.

PRIMARY PURPOSE OF JOB

The Account Manager performs the essential functions of the position, which include providing exceptional service and support of current and prospective clients, carriers, team members and Advisors. This position requires strong communication skills, ability to work well independently as well as in a team environment, strong attention to detail and the ability to multi-task in a paperless environment.

ESSENTIAL FUNCTIONS AND PERFORMANCE AREAS

- Provide excellence in customer service to existing and prospective client base as well as internal staff.
- Take new business call-ins and requests and make referrals to appropriate departments.
- Determine if desired coverage fits with Ollis/Akers/Arney carriers.
- Present quotes and proposals to clients.
- Review client coverage levels and policies to ensure they meet client needs, agency standards, and standards of the companies represented; recommend changes as needed.
- Prepare quotations, proposals, binders, endorsements, and coverage summaries to provide exceptional care to customers.
- Prepare and submit new business and/or account renewals to carrier marketplace according to established procedures.
- Order and issue binders, certificates, policies, endorsements, and other related items; verify their accuracy; provide documentation to client with appropriate correspondence.
- Provide technical support to Advisors to include cross-selling and upgrading opportunities.
- Perform general office duties including answering phones, making copies, preparing faxes, etc.
- Follow through on all inquiries, requests, and submissions to ensure timely receipt and response.
- Maintain and update activity records in agency management system according to current process and procedure (including requesting plan documents from carriers & imaging into database).
- Ensure documents and guidelines in the Personal Lines tab on the intranet are up-to-date as notifications are received.
- Perform additional duties as requested by Advisor, management or team members.

KNOWLEDGE, SKILLS and ABILITIES

- Knowledge of company products, services, policies and procedures.
- Knowledge of insurance marketing, rating, renewal and underwriting processes.
- Knowledge of current property & casualty insurance regulations.
- Knowledge of Google Docs for interdepartmental communication.
- Skill in completing multiple tasks at once.
- Skill in identifying and resolving customer problems in an efficient and friendly manner.
- Skill in professional, tactful negotiation and persuasion to achieve objectives.
- Skill in operating office equipment and proficiency in utilizing Excel and other Microsoft Office

software applications.

- Ability to pay close attention to detail and to ensure accuracy of reports and all client communication.
- Ability to be decisive; evaluating tasks, duties or projects using good judgment and decision-making skills.
- Ability to work independently and on a team, be self-motivated, and meet managerial and departmental team goals.
- Ability to take initiative; to make, form, conceive and visualize thoughts and expressions to produce new methods, suggestions or solutions.
- Ability to follow oral and written instruction.
- Ability to meet with a prospect or client, as needed.
- Ability to work in a fast-paced, team environment with frequent interruptions.

CORE COMPETENCIES

Building Trust – Interacting with others in a way that gives them confidence in ones’ intentions and those of the organization.

Customer Focus – Ensuring that the customer perspective is a driving force behind business decisions and activities; crafting and implementing service practices that meet customers’ and own organization’s needs.

Communication – Clearly conveying information and ideas through a variety of media to individuals or groups in a manner that engages the audience and helps them understand and retain the message.

Continuous Learning – Actively identifying new areas for learning; regularly creating and taking advantage of learning.

Engagement Readiness – Demonstrating a willingness to commit to one’s work and to invest one’s time, talent and best efforts in accomplishing organizational goals.

Managing Work (includes Time Management) – Effectively managing one’s time and resources to ensure that work is completed efficiently.

EDUCATION, TRAINING AND EXPERIENCE REQUIREMENTS

- Associates’ degree or equivalent college coursework in business or a related field is preferred.
- Minimum of two years of experience in insurance industry required, preferably in an Account Manager role.
- Must possess or be actively engaged in obtaining the Certified Insurance Service Representative (CISR) designation within first 12 months of employment.
- Missouri Property & Casualty Producer License is required.

PHYSICAL CONTEXT AND WORK ENVIRONMENT

Physical Requirements	Percentage of Work Time Spent on Activity			
	0-24%	25-49%	50-74%	75-100%
Seeing: Must be able to see well enough to read proposals, reports and use computer.				X
Hearing: Must be able to hear well enough to communicate with customers, vendors and employees.				X
Sitting: Must be able to sit for long periods of time.				X
Standing/Walking: Must be able to move about department.		X		
Climbing/Stooping/Kneeling: Must be able to stoop or kneel to pick up items from the floor.	X			
Lifting/Pulling/Pushing: Must be able to lift 10 pounds with or without reasonable assistance and set up work spaces.	X			
Grasping/Feeling: Must be able to type and use equipment and electronic devices.				X

Working Conditions

Normal working conditions in an office environment absent extreme factors.

The statements herein are intended to describe the general nature and level of work being performed, but are not to be seen as a complete list of responsibilities, duties, and skills required of personnel so classified. Also, they do not establish a contract for employment and are subject to change at the discretion of the employer.

Employee Signature

Date