

## Position Description

Position Title: **Commercial Lines Account Manager**

Reports To: **Commercial Lines Department Manager**

### JOB SUMMARY

This position is responsible for providing assistance to producers in handling and processing of new and renewal commercial lines business.

### Essential Functions

- ❖ Coordinate expirations with producer and/or account executive to obtain renewal and/or new business information. Maintain expiration control log.
- ❖ Provide in-house customer service to clients as assigned and requested.
- ❖ Assist in marketing new and renewal business, determine premiums, prepare presentation packets and maintain underwriting and marketing information by carrier.
- ❖ Check new and renewal policies for accuracy in rating, typing, coverages, signatures, and input these transactions to generate billing invoices. Ensure that these items are delivered and/or mailed to client.
- ❖ Receive phone calls from clients and companies regarding insurance, claims, or administrative problems, and comply with the request and/or refer to the producer only when necessary.
- ❖ Maintain a suspense system to follow up on outstanding orders, correspondence, reports, and follow up on overdue and suspense items.
- ❖ Be familiar with and follow agency E&O guidelines.
- ❖ Maintain electronic and/or paper files in an orderly, up-to-date manner.
- ❖ Perform special projects at management's request.

### *JOB REQUIREMENTS AND QUALIFICATIONS*

Must be a self-starter with good communication skills, both verbal and written. Should have thorough understanding of commercial lines underwriting and coverages. Minimum of two years of experience in similar position is desirable. Must be licensed per state requirements.

### OTHER INFORMATION

- ❖ Frequently work at a fast pace with unscheduled interruptions.
- ❖ This is a public contact position that requires appropriate business apparel.

The statements contained in this job description reflect the general details as necessary to describe the principal functions of this job, the level of knowledge and skill typically required, and the scope of responsibility. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absences or relief, to equalize peak work periods or otherwise to balance the workload.