



Commercial Lines Account Manager

Department: Commercial Lines (CL) Insurance
Reports To: Agency Operations Manager
Supervises: None

Job Description:

The CL Account Manager is responsible for providing assistance to new and existing commercial insurance customers. In addition, the Account Manager will maintain client information in AMS360 insurance database and perform other office administrative functions.

Primary Job Functions may include:

- Opening and preparing office for daily work, including opening and distributing mail.
- Providing efficient and courteous customer service, in-person and on the phone.
- Processing new/renewal business, including reviewing for accuracy, collecting email addresses and invoicing.
- Corresponding with company underwriters, negotiating insurance pricing and coverage based on personal knowledge or at Producer's request.
- Receiving and recording payments, then forwarding to correct companies; balancing cash drawer and preparing bank deposit.
- Processing all activities, including new claims, claim updates, endorsements, renewals & cancellations in our agency management database system- AMS360.
- Processing submissions for new and remarketed business and sending appropriately to designated companies.
- Reviewing assigned client files at expiration and addresses coverage gaps in order to protect our clients' assets and retain our existing business.
- Reviewing renewal lists with and providing support to the Producers, including providing renewal information to the client as needed.
- Requesting and sending loss runs to designated requesters.
- Completing appropriate Certificates of Insurance and Evidence of Property as needed.
- Scanning and attaching non-downloading policies, emails and audits.
- Filing documents in timely manner and keeps computer files up to date.
- Following and being familiar with Procedures Manual and attending company meetings.
- Making referrals to other LifeStore divisions through CRM.
- Keeping current on requirements for NC insurance license continuing education.

Minimum Qualifications:

- High School diploma or equivalent.
- P & C license or willingness to obtain within 90 days.
- Strong verbal and written communication skills with attention to detail.

- Interpersonal skills to build and maintain professional supportive relationships with customers and team members.
- PC and keyboarding skills, including experience with Windows operating systems.

Physical and Mental Requirements:

- Must have the ability to work the hours and days required to complete the essential functions of the position, as scheduled. Vision, hearing, dexterity, and speech are required. Ability to read, analyze and interpret information related to position-related documentation and requirements. Other normal office-related physical demands may be necessary.
- Must have the ability to listen, reason, think, concentrate and interact with others. The ability to exercise self-control and work under stressful conditions is necessary. Must have the ability to collect data and conduct research and solve position-related problems.

Employees are expected to perform other duties as assigned and directed by management and to adhere to all company and compliance policies and procedures. Job description and duties may be modified when deemed appropriate by management.