REPORTS TO: Kathy Henrich
DEPARTMENT: Commercial Lines
STATUS: Full-time, Exempt
LOCATION: Any Location

Account Manager

PURPOSE:

The Account Manager provides the technical background and analysis to enable the Business Risk Advisor to solicit new business and retain existing clients.

KEY RESPONSIBILITIES:

1. Assists Advisor with marketing and sales activities.
    a. Meets with commercial insurance prospects, upon request.
    b. Understands prospects needs and matches needs with policies offered by various carriers.
    c. Coordinates Proposals for prospective clients.
        a. Create submissions and submit to carriers.
        b. Follow-up to ensure proposals are received from carriers.
        c. Review proposals when received for correct coverages and policy choices.
        d. Make recommendations to Advisor based on the proposals received from the carriers.
        e. Create and maintain client workbook
        f. Prepare client presentations
        g. Utilize Zywave, Mod Master, and other tools as a marketing and sales tools, as needed.
    d. Coordinates the process to convert a prospect into a new client.
        a. Provides all necessary paperwork to CL Customer Service Representative (CSR) for processing.
        b. Facilitates Quarterly Client Meetings
            a. repare packets with assistance of CSR, if needed.
            b. Conduct, or assist in client meetings, as requested.
1. Manage the Client Service Plan.
    a. Manage the action plan created with the client.
    b. Setup the quarterly meetings.
    c. Assist the advisor with audits and the presentation.
2. Ensure retention of business by preparing for renewals.
    a. Create and maintain a calendar list of renewals in order for advisor to contact clients 90 days prior to renewal rates.
    b. Review prior year plan, analyze the cost/benefit for clients/prospects identify potential coverage changes and recommendations.
    c. Request options with current carrier and review with Advisor to determine whether to submit for bid.

    d. Work with Advisor to obtain needed information to develop quotes from carriers.
    e. Prepare Proposal for client presentation.
    f. Submission of changes is sent to CSR for processing. Assist as necessary to complete process.
3. Ensure client satisfaction.
    a. Maintain relationship with clients to stay aware of their needs and issues and utilize Zywave and other tools to respond, when possible. Strive to resolve any issues maintain documentation.
    b. Follow up with clients/prospects' technical and compliance questions, by providing articles/information that directs them to the appropriate solutions.
    c. Assist with special projects, such as Zywave Campaigns.
    d. Assist Advisor by reviewing to comprehend contracts and insurance implications.
    e. Attend carrier meetings.
    f. Respond to all incoming calls, voicemails, and emails from clients, ideally within the same day.
    g. Other duties as assigned.
4. Stay aware of the market.
    a. Maintain knowledge of underwriting criteria for CL carriers represented by the agency.
    b. Keep up-to-date on company issues, coverages, rates, rules, etc.
    c. Select markets where you want the risk quoted.
    d. Maintain a working relationship with underwriters.
    e. Be familiar with company website(s) so you can access information, as needed.
    f. Become familiar with rating systems and be able to use it to quote new business, etc.
    g. Solicit referrals from existing CL accounts and obtain cross-sell referrals from other departments within the agency.
    h. Provide referrals to other departments within the agency.
    i. Keep abreast of current marketing techniques. Provide communication and marketing ideas to the department so as to benefit the growth of the agency.

KNOWLEDGE, SKILLS & ABILITIES:

1. Indiana Property Casualty Advisor's license is required.
2. A thorough understanding of all products within 90 days of employment.
3. This fast-paced position requires an Associate or Bachelor degree or equivalent business experience; the ability to read quickly with good comprehension; the ability to write using good grammar and punctuation and precise mathematical skills.
4. The ability to use Excel and AMS360 to develop easy to comprehend spreadsheets.
5. The ability to access and maneuver company websites for forms, application, and renewal status, quoting information and submission.
6. Professionally maintains confidential information.
7. Empathic listening skills and careful speaking skills.
8. A thorough knowledge of the phone system, including the ability to transfer calls and conference call.
9. The ability to use Outlook to send and receive emails including attachments.
10. The ability to utilize the in-house software systems within 60 days of employment. These skills include using the faxing system, HubSpot, scanning and attaching appropriate items in AMS360, and using Advisor Plus or similar programs.

PHYSCIAL DEMANDS & WORKING CONDITIONS:

- Viewing computer terminal, perceiving, and transcribing data with accuracy and keyboarding fill much of the day in an office environment.
- Communication with telephone callers and associates requires an ability to express oneself as well as perceive and exchange ideas.
- The employee is not exposed to adverse environmental conditions, working primarily in an office environment.
- Sedentary work. Exerting up to 10 pounds of force occasionally and/or negligible amount of force. Work can require stooping, kneeling, crouching, as well as grasping objects, and reaching with hands and arms.
- The employee is occasionally required to stand and walk.
- The employee is occasionally required to travel to meetings and enrollment events which may require driving, walking, and climbing/descending stairs.

I have reviewed this job description with my manager. By signing below, the employee acknowledges that they are aware of the scope, responsibilities, and requirements of this position.

Employee Signature: ___________________________________ Date: __________________________

Manager Signature: ____________________________________ Date: __________________________

Approved by Melissa Grott on 8.25.17