

PERSONAL LINES ACCOUNT MANAGER

REPORTS TO: Agency owners

PRIMARY ROLE: Provide an extraordinary level of client service and satisfaction, building and maintaining client relationships by handling the following:

- All Personal Lines endorsement activity, such as vehicle, and property coverage changes.
- Routine coverage and billing questions
- Claims reporting
- Prepare reports as needed from Agency Management System

QUALIFICATIONS &
EDUCATION:

- Hold State insurance license, (or obtain within 60 days).
- Minimum of 2 years Customer Service experience.
- A passion to serve others and provide memorable customer service experiences.
- Knowledge of personal lines insurance.
- Attention to detail in documentation of all customer interactions and transactions.
- Experience and expertise in operating in a paperless environment, excellent automation skills, including Outlook, Word, Excel and carrier proprietary systems.
- Excellent time management, organizational, verbal and written communication skills.
- High degree of self-motivation and self-direction.

DUTIES:

- Provide centralized client servicing for multiple locations
- Maintain electronic client files, accurately and consistently documenting conversations, sending confirmations to clients, and adhering to all other automation procedures.
- Prepare Expiration reports monthly for Producers from Agency Management System & assist in renewal process.
- Prepare Renewal reports monthly, and update Agency Management System per procedure.
- Provide consistent, accurate, and timely communication to clients through verbal and written correspondence.
- Complete changes to existing policies, such as adding or deleting vehicles, amending addresses and coverages.
- Field billing questions
- Report claims to carriers and follow up per procedure
- Achieve agency account retention goals through proactive account rounding, up-selling of limits and coverages. Minimum retention goal is 90%.
- Participate in courses for insurance/sales skills. Maintain current knowledge of underwriting requirements of carriers. Keep current with industry trends by reading appropriate journals and company bulletins.
- Provide updates to producers and copy producers on all correspondence.
- Participate in special projects at management's request