

Job Description



Job Title:	Account Manager	Job Category:	Customer Service
Department/Group	Insurance Department	Office Hours	8:30 am – 5:30 pm
Location:	8117 Ebenezer Church Rd., Raleigh, NC 27612	Travel Required:	minimal
Level/Salary Range:		Position Type:	Full Time
HR Contact:	Sherry Robertson - sherry@igoinsurance.com	Date posted:	05/06/2016
Will Train Applicant(s):	Jimmie Robertson	Posting Expires:	05/13/2016

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Job Purpose:

The Account Manager (AM) is the foundation of good service within the agency. Because of their personal contact with clients, they must provide consistent, quality support, in order to keep business on the books. In their primary role, the Account Manager will report to management. In addition, this position is designed to provide producer support in working with clients. The AM works closely with all agency producers, within their assigned alphabet, in the main office.

Duties and Responsibilities:

Account Managers are responsible for handling their own book of business, with little input from the producer, after the account is written. AMs may be expected to cross sell personal lines and bonds. Account Managers are also responsible for the accuracy and management of the accounts within the agency management system. Approximately half of their time should be spent talking to clients or insurance company personnel, gathering and distributing information, and problem solving. The balance of time is spent on paperwork and computer input.

Although this job description is not intended to be all-inclusive, the following is a general list of responsibilities. Employees may be asked to perform other related duties in addition to:

- Manage the current accounts assigned for customer service
 - File changes and required updates on accounts with the carriers
 - Update the agency management system with new or updated file information
 - Complete all paperwork by scanning to the agency management system
- Take incoming phone calls from clients with service issues
 - Handling billing inquires or problems
 - Filing claim reports with carriers
 - Processing policy changes with carrier

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- Internal processing
 - Processing policies and endorsements to send to customers including review for accuracy and filing
 - Processing cancellations and reinstatements
 - Preparing the outgoing mail and distributing incoming mail – daily
- Marketing new business accounts
 - Completing in house underwriting, carrier selection, and application review
 - Quoting accounts in carrier systems, comparative rater, or preparing for submission
 - Rapidly recalling all the related issues with an understanding of how they may affect the other aspects of handling the account
 - Price negotiation
 - Delivering final price for selling yourself or the field producers
 - Review of application prior to submission to carrier for issuance
 - Scanning paperwork to agency management system
- Working with field producers on accounts resolving issues and addressing problems
- Support staff of the agency
 - Train and guide the agency staff on the service procedures
 - Planning, change recommendations, and management updates on service operations regularly
 - Support all staff in areas of unfamiliarity
- Attend regular meetings with support staff
- Provide Certificates of Insurance, Evidence of Insurance, ID cards, etc.
- Attending the required Continued Education classes to maintain license
- Cross selling other lines not currently writing

Skills

- ~ Solid commercial insurance knowledge
- ~ Excellent customer service skills - ability to act as a go-between for the different parties such as clients, producers, underwriters and agency owners - are a must
- ~ Exceptional time management and organizational skills with a precise attention to detail
- ~ Use of a logical path to collect all data, knowing what information to gather and how to ask for it
- ~ Ability to adapt quickly in a fast-paced environment
- ~ Exemplary communication skills, equally divided between listening and talking
- ~ Must be a “people person” with good social skills, patience, determination and diplomacy
- ~ Ability to handle complaints and negotiate a favorable outcome

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- ~ Positively receive criticism from others, as well as provide constructive input to resolve problems
- ~ Self-motivated, responsible, and trustworthy

Qualifications:

- Valid and current North Carolina Property & Casualty License, additional state licenses a plus
- Minimum 3 years administrative commercial insurance experience
- Thorough working knowledge of commercial lines policies including commercial packages, commercial auto, workers comp, umbrellas, etc.
- A significant working knowledge of Microsoft Word and Excel is required
- Previous use of agency management software is required, Applied Systems (TAM Online) knowledge is a plus
- High school diploma or equivalent
- CISR certification is highly desired, as well as AIC and AIS

Reviewed By:	Jimmie Robertson	Date:	05/06/2016
Approved By:	Jimmie Robertson	Date:	05/06/2016
Last Updated By:	Sherry Robertson	Date:	05/06/2016