



## Commercial Account Manager

**Reports To:** Commercial Department Manager; Operations Manager

**Status:** Salaried Non-Exempt

**Location:** Availability in Charlotte, Tryon or Forest City, NC

**Job Summary:** The Commercial Account Manager works closely with Producers, carriers, and clients to perform the primary responsibilities outlined below.

**Primary Responsibilities:**

- Processes incoming mail, e-mails, faxes, phone calls and office visits; responds promptly and professionally
- Analyzes client needs, coverage forms, policies and quotes; identifies exposure to loss and recommends appropriate coverage solutions
- Occasionally accompanies Producer on prospect and client meetings if needed
- Completes applications and submits to appropriate carriers for quoting and issuance
- Prepares summaries of insurance, schedules and proposals as needed
- Orders and issues binders, proofs of insurance, endorsements and other related items
- Reviews audits of policies; verifies accuracy and facilitates corrections as needed
- Determines reasons for cancellation requests; acts to save accounts
- Processes renewals in accordance with agency standards and procedures
- Assists clients in submitting first reports of claims; facilitates prompt response from carrier; follows up on claims status in accordance with agency standards and procedures

**Personal and Organizational Development:**

- Sets priorities and manages workflow to ensure efficient, timely and accurate processing of transactions and other responsibilities
- Maintains a cordial and effective relationship with clients, coworkers, carriers, vendors and other business contacts
- Interacts with others effectively by utilizing good communications skills, cooperating purposefully and providing information and guidance, as needed, to achieve the business goals of the agency

*This job description is intended to describe the level of work required by employees in this position. The principle duties outlined above are the essential responsibilities, but additional tasks may also be required by management.*

- *Ability to carry out complex tasks with many concrete and abstract variables*
- *Ability to communicate orally and in writing with others to explain complex issues*
- *Ability to understand written and oral communication, and interpret abstract information*
- *Develops and maintains comprehensive knowledge of insurance industry, including products, coverage, legislation, and technology*

**Knowledge, Skills and Abilities:**

- *Appropriate producer insurance licenses (Property, Casualty, Life, Health, Accident and/or Sickness preferred)*
- *Knowledge of insurance products, markets, rating and underwriting procedures*
- *Working knowledge of Microsoft Windows, Word, Excel, and Outlook*
- *Working knowledge of Agency Management Systems (Applied Epic preferred)*
- *Ability to perform 90% sedentary work*
- *Field of vision must be adequate to perform computer related responsibilities which are used in 100% of work*
- *Four-year college degree highly desirable*

**Working Conditions:**

- *High pressured, fast-paced environment with significant telephone and personal disruptions*
- *Large number of multiple steps in complex system performed with accuracy and speed*
- *Applicants will be tested*

**To Apply:**

- *Apply online at [www.mainstreetins.com/jobs](http://www.mainstreetins.com/jobs)*

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