

Commercial Lines CSR/Account Manager

SUMMARY

Commercial Lines CRS performs essential functions of the position listed below, aiding perspective agent and clients with servicing insurance policies and processing paperwork.

PRIMARY RESPONSIBILITIES

New Business

- Quote new business, market and prepare policies for the agent to review and adjust as necessary.
- Process all new business for the agent as instructed. Ensure that coverages are as listed on the paperwork from the agent. Follow up with the agent as much as necessary to ensure the policies are all in place as needed.
- Quote and bind small commercial policies for walk-in or phone clients.
- Assist agent by working with loan processors, closing attorneys and underwriting rebuttals.

Customer Management/Retention

- Prepare renewal policies for agent to review and adjust as necessary.
- Respond to all questions and provides service in accordance with established procedures and best practices.
- Perform outbound calls and follow-up work as required to process customer requests.
- Answer questions and provide explanations regarding service requests and coverage for policies, limits, deductibles and billing.
- Process changes, reinstatements and cancellations for all types of policies. Answer questions and make changes to existing policies (bank draft, vehicles, transfers, lien holders, etc.).
- Handle agent and client correspondence and related paperwork. Sign required forms as needed.
- Issue certificate of insurance, evidence of insurance and other documents as to ensure proof of insurability.
- Follow up on outstanding claims and assist as necessary.

Organization

- Maintain reports and records in Agency Management System.
- Maintain activity and suspense file in AMS360 in order to manage all open items and customer requests.
- Maintain regular contact with clients. Send, remind or assist agent in preparing notes for welcoming, sick, bereavement, etc.
- Identify and prioritize own work according to prescribed standards.
- Review and answer underwriting emails.

Knowledge, Skills, and Abilities

- *Required* Licensed in the state of North Carolina for Property and Casualty
- *Required* Full knowledge of insurance products and usages
- Maintain state licensing as required for property/casualty products. Continuing education as required by state(s).
- College education or equivalent relevant work experience.
- Experienced in Exceptional Customer Services
- Maintain a consistent quality and quantity of work at prescribed standards.
- Maintain a concern for timeliness and completeness when interacting with customers, agency and company personnel to minimize potential for error or omission claims.
- Assists and contributes to the team's current goals by meeting individual goals.
- Proficient in Microsoft Office 365
- Knowledge of Vertafore, AMS360 client management system, preferred
- Self-motivated and professional
- Thorough, detail-oriented to manage multiple clients, task, and requests
- Performs all other duties as assigned.

Remote work optional for right candidate
Brinson Insurance Agency is an EOE

Submit resume and cover letter to alissa@brinsonins.com