

Personal Lines Account Manager

Job Summary:

The Personal Lines Account Manager assists clients with service and sales needs of personal lines (home and automobile) insurance policies. Service and marketing responsibilities are required in this position. Meet service and sales standards and perform essential functions to the quality and service standards developed by the agency.

Primary Responsibilities:

- Regularly communicates with clients discussing the details, billing, changes, etc. on their home and automobile policies
- Orders and issues insurance binders for home and automobile renewals
- Prepares summaries of insurance, schedules and proposals for word processing as needed.
- Verifies policy and policy change information, facilitating corrections when necessary.
- Processes incoming mail and phone request, responding promptly and appropriately.
- Processes and follows up on cancellation requests to carriers to ensure accurate and timely resolution
- Assists clients in making changes on their policies including but not limited to: auto and home additions, rental houses, motorcycles, etc.
- Identifies exposure to loss and recommends appropriate coverages.

Personal and Organizational Development:

- Sets priorities and manages work flow to ensure efficient, timely and accurate processing of transactions and other responsibilities.
- Maintains a cordial and effective relationship with clients, co-workers, 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.

Knowledge, Skills and Abilities:

- High School Diploma Required
- Ability to communicate orally and in writing with others to explain complex issues, receive and interpret complex information, and respond appropriately.
- Ability to understand written and oral communication, and interpret abstract information.
- Familiarity with computer and word processing programs.
- Work well in a team environment