

JOB DESCRIPTION

JOB TITLE: Commercial Insurance Account Manager
DEPARTMENT: Commercial Lines
REPORTS TO: Commercial Lines Manager
WORK HOURS: 8:00 AM to 5:00 PM Monday through Friday, One Hour Lunch
Option for 8:30 AM to 5:30 PM

Summary:

The role of this position will be to work with a commercial lines producer in the development of new business, as well as managing existing commercial accounts. You will perform routine service work, as well as prepare for each policy renewal with a focus on the retention of that client. You'll be involved in application paperwork, marketing the account with our available insurers, and preparing quotes in our on-line rating systems.

Essential Duties and Responsibilities:

Will need to become proficient working in our client database and management system to produce applications, maintain client records, review and service renewals and remarket client accounts as necessary. Will need to establish relationships with underwriters and brokers that are a critical part of the account development. Attention to detail and accurate work is essential. Must be comfortable working in a team environment and responsive when asked to balance work or back-up another member of the team.

All other duties in support of the commercial department or the agency as directed.

Educational Requirements:

High School Diploma; College and/or professional development courses preferred.

Certificates, Licenses and Registrations Required:

Montana Insurance License Examination must be taken and passed, as position will require a valid Insurance License.

Specific Personality Traits:

Must be confident and able to deal with the general public in a positive, respectful and professional manner. Will need to have great organizational skills in order to manage a busy desk with interruptions, and prioritize date sensitive work flow. Maintain a positive and even temperament in the office, be dependable and punctual. Have an enthusiasm for reading and learning and enjoy the creative challenge of developing insurance coverage that is often unique to each commercial client.

Knowledge and Skills Required:

Industry knowledge of terminology and coverage concepts. Proficient with current desktop technology (personal computer), Microsoft Office software, Excel, standard office equipment, business telephone system, and experience working with databases.

Supervisory Responsibilities:

None

Commercial Insurance Account Manager – Continued

Physical Demands:

Office environment, sitting for extended periods, light lifting.

Appearance or Dress Code:

Professional office attire with some restrictions.

Revised 11/06/2018

Mail or email resume.

Compensation Package: Salary DOE, to include Benefits and Production Bonuses