



JOB DESCRIPTION

Position: Account Manager

Department: Commercial Lines

Objective: Under direction from the Commercial Lines Manager, provide support in obtaining, maintaining, and servicing commercial accounts for Arbor Insurance Group.

Duties:

- Assist producers in assessing risk, quoting and selling new business accounts
- Review producer applications for completeness, accuracy, veracity and signatures
- Arrange and prepare premium finance contracts as necessary
- Utilize agency management system and carrier websites to process new business, renewals, endorsements, audits, cancellations, certificates of insurance, auto ID cards, evidence of insurance, broker of record letters and claims in a timely manner
- Provide superior customer service to book of business assigned to you by anticipating and responding to customer needs in a timely and professional manner
- Utilize agency management system to document all activities
- Analyze policy coverage and make or suggest changes as appropriate; review policies and related documents for accuracy
- Coordinate the marketing and placement of coverage with participation of Producer, New Business Marketing Coordinator and/or Commercial Lines Manager
- Communicate and interact with company personnel as appropriate
- Maintain, interact and nurture client and company relationships
- Comply with laws and regulations that apply to the position
- Premium billing when Company download or direct entry not available
- Accept and process payments from clients when necessary
- Prepare proposals, renewal portfolios, and related items for Producer presentation/delivery
- Maintain customer files
- Participate in seminars and classes for skill, knowledge, and professional development. Maintain Continuing Education requirements as needed to hold license.
- Follow established agency policies and procedures
- Be an effective and dependable team member, able to express and solicit opinions, seek solutions, and successfully bring objectives to conclusion.
- Perform other duties as requested by management



Authority:

- PA Property & Casualty License is required
- Authorize Commercial Lines coverage binding within authority granted by the carrier
- Discuss and negotiate coverage with company underwriters
- Advise producers when contact with client or company is required
- Accept payments from customers within company authority
- Obtain customer signatures on documents as needed
- Recommend changes in procedures based on observance of daily activities

Performance Measurement Criteria:

- Timely completion and submission of required reports to management
- Degree of adherence and compliance with Agency procedures, personnel policies and accounting practices
- Degree and quality of professional development
- Adherence to company binding authority guidelines
- Degree to which service standards have been maintained
- Ability to maintain positive and productive relationships with producers, staff, clients and carriers
- Knowledge and utilization of agency systems and company proprietary websites