

POSITION DESCRIPTION ACCOUNT MANAGER



POSITION OBJECTIVE:

Responsible for the servicing needs of Insgroup clients and prospects and maintenance of client information in Agency Management Systems (AMS).

ESSENTIAL DUTIES: RENEWALS / NEW BUSINESS

1. Perform the following tasks for new and renewal business with appropriate assistance / supervision from the Account Executive or Department Manager:
 - Provide renewal notice to Producer 120 days prior to expiration;
 - Complete renewal checklist;
 - Create / update coverage specifications;
 - Submit renewal applications, specifications, loss runs, and loss summary to marketing department; In some instances you will be asked to market / negotiate directly with the markets;
 - Review quotes and prepare proposal when necessary;
 - Participate in renewal presentation to client as requested by Producer;
 - Bind coverage with underwriters prior to expiration as directed by Producer;
 - Process renewed account in AMS;
 - Prepare renewal binders for client;
 - Prepare the master templates in AMS for COI and EPI's;
 - Prepare summaries, complete final policy checks, and close open items;
 - Mail or deliver policies to clients as requested by Producer;
 - Review work prepared by Assistant Account Manager
 - Maintain client information in AMS with assistance of the Assistant Account Manager.
2. Participate in the new and renewal business marketing process with Insgroup Marketing Department.
3. Respond to and fulfill the requirements generated by the Renewal Time Line.

ACCOUNTING / AUDITS

4. Work with Accounting and Account Assistant to resolve accounting criticisms
5. Review Audits and provide assistance to Assistant Account Manager

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GENERAL:

6. Responsible for the accuracy of work processed by the Assistant Account Manager.
7. Process policy endorsements, etc., with assistance from the Assistant Account Manager.
8. Analyze situations, identify problems, recommend solutions, and evaluate outcomes.
9. Respond in a timely manner to the requests and needs of clients and Insgroup Associates.
10. Make a positive contribution to customer satisfaction and constantly strive to improve service to the customer.
11. Communicate in a positive manner to contribute to a cohesive, pleasant work environment. Motivate, instruct, and promote teamwork and associate development.
12. Protect the confidentiality of information learned by performing the duties of the position.
13. Comply with Insgroup procedures and policies.
14. Attend meetings, educational workshops, carrier functions, staff meetings, and social events when requested.
15. Responsible for regular and punctual attendance.

NOTE: Certain Account Manager positions do not have Account Assistants. The Account Assistant's duties will be incorporated into the Account Manager's duties in those circumstances.

OTHER RESPONSIBILITIES:

16. Train, mentor and give technical supervision to Assistant Account Manager.
17. Ability to travel by automobile and aircraft, and may stay more than one day and night.
18. Accumulate required continuing educational credits to maintain current insurance license.
19. Perform other work-related duties as assigned.