



Job Description

Position Title: Account Manager
Reports To: Department Team Leader
Location: Salt Lake City Office

Classification: Non-Exempt
Hours: Full Time

Position Summary

This is a position assisting Producers in handling and processing new and renewal lines business and providing customer service to clients as assigned and requested.

Essential Duties and Responsibilities:

- Assist in marketing, analysis and servicing of commercial insurance business in accordance with procedures outlined by the organization
- Develop and produce submissions for marketing on renewal account to carriers
- Prepare proposals for renewal policies in accordance with coverage's and limits
- Attend pre-renewal and renewal meetings
- Bind renewal policies
- Provide ongoing service to clients, including but not limited to binders, invoices, endorsements, and certificates
- Check policies to assure that coverage's and limits are as ordered and that they match agency management system
- Analyze and compare quotations and reviews forms for proposals
- Review policy forms to ensure that correct forms are included on the policy
- Maintain account file in agency management system, including incoming and outgoing e-mail correspondence
- Perform in a manner that will prevent errors and omissions
- Communicate the daily work of the Assistant Account Manager (if applicable)
- Be well-rounded with regards to various lines of coverage and be able to review potential exposures that can be addressed through risk transfer
- Specialize in evaluating risks and consulting on missing coverage to ensure our clients are adequately insured
- Assist in expanding existing accounts by rounding out and cross-selling additional insurance products
- Assist in developing a service plan tailored to clients needs and work with producers and others to service clients
- Conduct periodic coverage and risk reviews to ensure the adequacy of the client program designs
- Work with clients during audits and educate the client on the audit results
- Process changes and renewals through communication with the insured, insurance companies and producers
- Pursue a program for personal and professional experience (education classes, seminars, workshops) in combination with individual study programs to expand your knowledge and skills
- Maintain and communicate up-to-date knowledge of market conditions, pricing strategies, market/product options and markets
- Performs other duties as assigned



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Qualifications:

Education and Experience:

- High School diploma or equivalent required
- Three or more years of experience in commercial (property and casualty) insurance, preferably with larger and more complex middle market clients and risks

Licenses or Certifications:

- Active Colorado Property and Casualty license required; Colorado Life & Health license desired

Required Job Knowledge and Skills:

- Knowledge of major insurance coverage's including General Liability, Commercial Automobile, Workers Compensation, Products Liability, Commercial Property, Umbrella, E&O, Fiduciary, EPLI and D&O
- Understand the content and structure of the insurance contract
- Excellent communication skills, including listening, speaking and writing
- Ability to understand and analyze commercial lines coverage forms, rating and policies
- Must be actively pursuing CISR, CIC, CRM, ARM or CPCU
- Ability to establish and develop strong relationships with clients, carriers, trusted business partners and coworkers
- Good organizational and time management skills
- Ability to work well with details
- Proficient in a variety of computer software applications used by the agency, including MS Word, Excel, Outlook and PowerPoint; EPIC; as well as the Internet and Carrier Web Sites

Physical:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to communicate verbally and to listen for instructions and information. The employee is also required to sit for long periods of time often in front of a computer monitor and operate a computer keyboard. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required include close vision, distance vision, color vision, depth perception, and ability to adjust focus.