



**Job Title:** Account Manager (Personal, Commercial & Farm Lines)  
**Reports To:** Operations Manager  
**Department:** Adams Insurance Advisors

## **SUMMARY**

Provide proactive support/service/sales activities of telephone customer service by providing customers in person and calling in on the telephone effective, efficient, and consistent service which enhances the profitability of the Agency's services by performing the following duties.

## **ESSENTIAL DUTIES AND RESPONSIBILITIES** Other duties may be assigned.

Identify existing customer needs and make appropriate recommendations. Handles telephone calls with professionalism and follows-up on any action needed related to each transaction.

Works with marketer on new policies to input information into Epic once policy has been issued and coordinates with production staff on delivery of policy to insured.

Maintains client files within the agency's automation system to ensure proper documentation by processing all endorsement changes, binders, certificates of insurance, documentation, activities, etc., according to agency procedures, and within agency timelines.

Corresponds with insured via telephone, email or other desired methods.

Communicates directly with customers regarding changes that need to be made to coverage and handles endorsing policies with the carrier. Once the change has been made at the carrier, deliver to insured via the customers desired distribution method.

Maintain control of binders, certificates of insurance, audits and aged receivables in accordance with agency guidelines.

Prepares agency invoices and takes payments according to the agency's collection policy.

Prepares remarketing documents and coordinates with marketer on remarketed and renewal accounts.

Handles taking claim information from customers and prepares proper documents to file the claim with the appropriate carrier.

Assists customers with claim questions though the entire claim process.

## **NON-ESSENTIAL DUTIES AND RESPONSIBILITIES** Other duties may be assigned.

Maintain educational and professional expertise through attendance at job related seminars, conferences and workshops and involvement in professional, civic, and community groups in leadership positions. Assist with training of any new customer services representatives to the agency.

## **SUPERVISORY RESPONSIBILITIES**

There are no supervisory responsibilities for this position.

## **QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Extensive knowledge of all lines of commercial insurance, including sophisticated and less common coverage, especially those products represented through the agency.

Experience and expertise in operating in electronic environment; excellent automation skills, including MIS, Outlook, Excel, document management software, carrier propriety systems and phone systems.

Excellent time management, organizational, verbal and written communication skills.

High degree of self-motivation and self-direction

## **EDUCATION and/or EXPERIENCE**

Appropriate State license(s); Associate's degree (A. A.) or equivalent from two-year college or technical school plus additional insurance related training; or four to five years related experience and/or training; or equivalent combination of education and experience.

## **LANGUAGE SKILLS**

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

## **MATHEMATICAL SKILLS**

Ability to work with mathematical concepts such as probability and statistical inference, and fundamentals of plane and solid geometry and trigonometry. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

## **REASONING ABILITY**

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

## **CERTIFICATES, LICENSES, REGISTRATIONS**

Must have or be in process of obtaining state insurance license and fulfill requirements to maintain license as set by the state Department of Insurance.

## **PHYSICAL DEMANDS**

While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. The employee frequently is required to stoop, kneel, crouch, or crawl. The employee is occasionally required to stand, walk, and climb or balance. The employee must frequently lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision.

## **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.