

# Commercial Lines Account Manager

**Department:** Producer Unit  
**Reports to:** Producer  
**Revision Date:** 9/2005

**FLSA:** Exempt  
**Grade:**

## POSITION SUMMARY

Support assigned Producer(s) by placing and processing new business, account development and renewal retention.

## JOB DUTIES/ESSENTIAL FUNCTIONS

1. Prequalify new business. Review, analyze and submit applications following agency marketing guidelines.
2. Review and order renewals according to agency procedures. Investigate company non-renewals and coordinate with insured and Producer(s) to remarket.
3. Prepare proposals and applications, submit to insured's and carriers (or marketing department); follow up to insure timely responses.
4. Assist clients in making appropriate coverage changes; inform and educate clients about coverages, exclusions, exposures and audits; document electronic file accordingly.
5. Provide technical support to Producer(s) to include survey policy coverages and identify cross-selling and upgrading opportunities.
6. Prepare quotations, coverage summaries/comparisons, proposals and recommendations needed to insure clients/prospects understanding of coverages.
7. Renew and remarket accounts as needed in conjunction with Producer(s) and agency standards.
8. Assist in design of insurance plans for clients.
9. Visit key clients in person.
10. Prompt and reliable attendance required.
11. Perform other duties as assigned.

## NONESSENTIAL FUNCTIONS

1. Act as back-up for other members of the staff during absences and peak work periods.
2. Present policies to insured which may involve traveling.
3. Receive supplies which may require some lifting.
4. General filing which may require some reaching.
5. Process expired files and get files ready for storage; prepare file cabinets for upcoming year which may require reaching and lifting.

## POSITION REQUIREMENTS

### **Education/Experience**

High school diploma or equivalent required; college coursework preferred. Complete knowledge of insurance practices and procedures of the agency and industry; minimum of six years experience with at least five in property and casualty.

### **Licensure/Certification:**

Current Producer's license required; CIC or CPCU completed or in process.

### **Personal Characteristics:**

Excellent prioritization skills; friendly, positive attitude; willingness to help others; excellent verbal and written skills; professional telephone manner; ability to establish effective relationships with all staff and the general public; ability to work on highly detailed work under pressure and time constraints.

I have read and understand the Commercial Lines Account Manager job description and can perform the essential functions with or without reasonable accommodation. Nothing in this job description restricts management's right to assign or reassign duties and responsibilities at any time. This job description reflects management's assignment of essential functions but does not prescribe or restrict the tasks that may be assigned.

Further, I understand that this job description in no way constitutes a contract of employment or restricts the rights of the Charles. L. Crane Agency as an "at-will" employer under Missouri law.

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Signature of Supervisor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date