

Job Description

Job Title: Marketing Account Manager

Supervisor: Cheryl Fennesy

FLSA Status: Exempt

Department: Transportation

Job Summary: This is a responsible position that involves administration, coordination, and execution of all duties, services, and practices related directly to our customers. The main focus of an Account Manager/Marketer is to provide professional and personalized service to each customer while maintaining the Agency's best interest at all times with regards to marketing strategy. The ideal candidate for this position will possess account management experience with an emphasis in new business marketing.

Essential Functions:

1. Engage in new and renewal strategy meetings with appropriate service team and producer and lead discussion with respect to marketing plan.
2. Attend marketing strategy meeting for new business with producer and selected service team.
3. Spearhead renewal and new business marketing efforts of chosen marketing plan by gathering underwriting information from producers, prospects, and service team.
4. Evaluate data provided to determine consistency and reasonableness of information which will be used in submission for actuarial study purposes and collateral calculation.
5. Help determine optional retention levels and provide logical interpretations of supporting data and documents.
6. Present submission to underwriters including time table requirements and target pricing.
7. Negotiate best terms, conditions, and pricing. Review quotes received for accuracy and compliance with applications submitted.
8. Assist in the review and preparation of proposals as needed.
9. Maintain high degree of technical, insurance, and risk management knowledge through research and attendance in industry seminars and continuing education efforts.
10. Develop and cultivate relationships with producers, company underwriters, and wholesale brokers. Attend industry functions and events sponsored by same.
11. Assist in the ongoing education and training of Cline Wood employees and associates by conducting sessions and one-on-one guidance as needed.
12. Other projects and assignments as directed by management.

Desired Qualifications:

1. Preference will be given to candidates with a Bachelor's Degree. Must possess or have the ability to acquire applicable resident and nonresident agency/broker license and comply with continuing education requirements.
2. Minimum of two years Account Manager or brokerage background with emphasis in the marketing of commercial risks.
3. Working knowledge of a wide array of insurance coverage, policy terms, and conditions including worker's compensation, general and automobile liability, marine, cargo, and property.
4. Demonstrated analytical, problem solving, and decision making skills and acute attention to detail.
5. Exhibits leadership qualities such as managing and coaching others.

6. Strong computer skills and proficiency in PC applications including Microsoft Office Word, Excel, and Outlook. Applied System knowledge is a plus, but is not required.
7. Effective verbal, written, and interpersonal skills including a demonstrated ability to produce and deliver focused communication throughout all levels of client organizations, Cline Wood Agency, insurance carriers, and third party brokers.
8. Strong aptitude for flexibility and multi-tasking with the ability to perform under pressure in a fast paced environment.
9. Minimal travel required on an as needed basis and on short notice.

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