

Job Description

Job Title: Account Manager

Supervisor: Dawn Perry

FLSA Status: Exempt

Department: Transportation, Middle Market

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 is to provide professional and personalized service to each customer while maintaining the Agency's best interest at all times.

Essential Functions:

1. Provides excellent customer service, which includes client visits, plan design, inquiry response, education and other client needs.
2. Remarkets with assistance of marketing personnel, contacts clients, renews policies by Agency standards.
3. Prepares proposals and applications, submits them to insureds and carriers, obtains clients' signatures of apps, follow up to ensure timely response.
4. Provides technical support to Producers (coverage analysis, with proposals, etc).
5. Maintains agency management system accurately and consistently, processes incoming mail requests accurately and promptly.
6. Explains audit procedures to clients and reviews with company and customer.
7. Uses agency credit and collection procedures to ensure agency maintains current A/R without bad debt.
8. Handles cancellations with care, legally saving all accounts possible with adherence to E & O guidelines.
9. Takes first reports of loss from insured & reports to company. Maintains Applied Claims system on claims activity and follows up with company and insured until claim is concluded satisfactorily.
10. Assists or completes other tasks as directed by Agency management.
11. Must be flexible with regards to work hours; willing to work early and/or late as necessary to successfully meet all deadlines.

Desired Qualifications:

1. Reading, writing, mathematical skills that would normally be acquired through the acquisition of a high school diploma.
2. Two years of commercial insurance processing or transportation industry experience preferred.
3. Ability to process detailed records in a timely and accurate fashion, according to established procedure.
4. Knowledge of Microsoft Office and ability to operate a personal computer using Word and Excel.
5. Must be able to communicate effectively with clients and others by telephone and in person.
6. Must be able to concentrate for extended periods of time.
7. Possession of or ability to acquire the appropriate resident and non-resident insurance agency or broker licenses.
8. Flexibility and ability to manage multiple shifting priorities.
9. Good judgment and discretion are necessary to maintain confidence and make sound decisions.
10. Minimal overnight travel required on an as needed basis and on short notice.
11. The ability to work closely with others and to contribute actively to the work group and with the organization productively and positively is required.

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