

Job Description

Job Title: Associate Account Manager I

Supervisor: Susan Salters

FLSA Status: Non Exempt

Department: Transportation

Job Summary: This position is responsible for providing internal administrative and technical support to the Transportation Department. Individuals should be flexible, supportive and demonstrate team work and cooperation towards all members of the company. A strong customer service mentality is of the utmost importance.

The Associate AM I position is an entry level position. Colleagues who have mastered all job responsibilities listed below are then eligible for promotion to the Associate AM II position. Associate AM II's are eligible for promotion to Account Manager positions based on need, availability and skill level.

Essential Functions:

1. Assists Account Managers, Account Executives, and Unit Managers in the processing and handling of daily changes and activities pertaining to client accounts. These duties include but are not limited to
 - Handling of renewal gathering letters
 - Request loss runs
 - Create loss summaries and large loss narratives
 - Create renewal certificate holder lists
 - Binding Process
 - Auto ID Cards
 - Update certificate templates
 - Create renewal applications for Non Great West Business
 - Mailing policies
 - Handling flood renewals
 - Handling Direct Bill Automatic Renewals
 - Processing surplus lines forms
 - Processing excess cargo quotes
 - Processing finance quotes
 - Setting up proposal templates
 - Handling all Western Surplus changes
 - Handling all change requests for autos and drivers
 - Follow up with clients regarding driver and equipment lists
 - Submitting renewal applications
 - Processing bond applications
 - Processing Additional Insured certificate requests
 - Transfer Marketing information to specialized and on-line applications and excel spreadsheets
 - Processing changes and renewals in the Great West Quick R8 system.
 - Notification of late reported claims
2. Assists or completes other tasks and projects as directed by Agency management.

Desired Qualifications:

1. Reading, writing, and mathematical skills that would normally be acquired through the acquisition of a high school diploma.
2. Possess or have the ability to acquire applicable resident and non-resident agency/broker license within 3 months of hire and comply with continuing education requirements.
3. Preference will be given to those with a minimum of one year brokerage background involving insurance processing, customer servicing and/or information handling. Preference given to candidates meeting requirements in the transportation industry.
4. Strong team environment skills with the ability to work independently or as part of a group.
5. Demonstrated analytical, problem solving, and decision-making skills and acute attention to detail.
6. Strong computer skills and proficiency in PC applications including Microsoft Office Word, Excel and Outlook.
7. Effective verbal, written, and interpersonal skills including a demonstrated ability to produce and deliver focused communication both verbally and in writing throughout all levels of client organizations, the Agency, as well as 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. The ideal candidate will possess the ability to grow their knowledge within this position and advance into roles increasingly integral to the department.

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