

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. Provide excellent customer service, which includes client visits, plan design, inquiry response, education and other client needs.
2. Remarket with assistance of marketing personnel, contact clients, and renew policies by Agency standards.
3. Prepare proposals and applications, submit them to insureds and carriers, obtain clients' signatures of apps, and follow-up to ensure timely response.
4. Provide technical support to Producers (coverage analysis, with proposals, etc.).
5. Maintain agency management system accurately and consistently, process incoming mail requests accurately and promptly.
6. Explain audit procedures to clients and reviews with company and customer.
7. Use Agency credit and collection procedures to ensure Agency maintains current A/R without bad debt.
8. Handle cancellations with care, legally saving all accounts possible with adherence to E & O guidelines.
9. Take first reports of loss from insured & reports to company.
10. Assist or completes other tasks as directed by Agency management.
11. Adhere to all Agency service standards.
12. Demonstrate flexibility 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. Preference will be given to candidates with a Bachelor's Degree.
2. Two years of commercial insurance processing or transportation industry experience preferred.
3. Must possess or have the ability to acquire applicable resident and nonresident agency/broker license and comply with continuing education requirements.
4. 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.
5. The ability to process detailed records in a timely and accurate fashion, according to established procedure.
6. Must be able to communicate effectively with clients and others by telephone and in person.
7. Must be able to concentrate for extended periods of time.
8. Strong computer skills and proficiency in PC applications including Microsoft Office Word, Excel, and Outlook. Sagitta and/or ImageRight system knowledge is a plus, but is not required.

9. Strong aptitude for flexibility and multi-tasking with the ability to perform under pressure in a fast paced environment.
10. Good judgment and discretion are necessary to maintain confidence and make sound decisions.
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.
12. Overnight travel required on an as-needed basis and on short notice.

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