



## POSITION DESCRIPTION

**Position Title:** Personal Insurance Account Manager

**Department:** Personal Insurance

**Reports To:** Personal Insurance Supervisor

**FLSA Status:** Exempt

### SUMMARY

Provide superior customer service to new and existing clients for home, auto and all personal insurance needs.

### ESSENTIAL RESPONSIBILITIES

- Manage a book of business (clients with personal insurance needs) by selling new policies or updating/renewing existing policies.
- Counsel clients by determining insurance needs and coverages, providing education and preparing quotes as necessary.
- Renew each home & auto insurance account with reviews and communication.
- Provide customer service via email, phone and in person to help clients and companies solve problems with a sense of urgency while exceeding expectations.
- Prepare paperwork and appropriate documentation for each policy and process changes in the Agency Management System.
- Use the Agency Management System to keep track of procedures, workflow and documentation.
- Remain informed and educated regarding all insurance companies, marketplace changes, coverages, exclusions and options so that you can provide the best possible balance between cost and coverage while still protecting each client.
- Develop positive long-term relationships with clients, underwriters and company personnel.
- Work as a team with other staff members to achieve agency new business and client retention goals.
- Complete all CE coursework as required or directed.
- Other duties as assigned.

### QUALIFICATIONS

Excellent communication, organizational, and customer service skills are required. Candidates must be able to effectively manage multiple tasks, interact well with others, and work well in a team environment. Good computer skills—including Microsoft Office and the internet are required. Candidates should have a Bachelor's degree and two years previous experience in Personal Lines insurance; however, appropriate experience may be substituted. Active agent's license required.