

ACCOUNT EXECUTIVE

Department

Commercial Lines

Reports To

Client Services Manager

FLSA Status

Exempt

About the Mahoney Group: Founded in 1915, The Mahoney Group is one of the largest independent insurance, risk management and employee benefits brokerages in the U.S. A Top 100 brokerage firm, our expertise includes a range of industries including real estate, construction, nonprofits, homeowners' and community associations, and Native American tribes, schools and businesses. We attribute our success to delivering insurance coverage tailored to our clients' specific needs as well as a dedication to making a positive impact on the world around us. With operations in seven states and more than 240 employees, we're also an employee-owned company. To us, that simply means we have the independence to prioritize our clients' interests above those of Wall Street shareholders or investors.

POSITION SUMMARY

The Commercial Lines Account Executive is responsible for supporting Advisors in the sale of new business and the retention of renewal business for the agency on select accounts determined by premium size and/or complexity. Manage day-to-day client contact.

OBJECTIVES

- Client facing, develop and maintain relationships with clients and prospective clients
- Identify the needs and risks of clients and prospects to determine the proper services, products, and/or combinations that will best serve their objectives
- Educate clients on current and proposed coverage and exclusions
- Oversee and coordinate new business exposure analysis, coverage program design and marketing submission; workflows leading to bound coverage; and implantation of service plan elements
- Provide proactive, personalized support to clients by marketing and placing renewals. Negotiate with carriers on behalf of clients.

- Manage, prepare and implement KPI's, stewardship reports/meetings, claims analysis and summary of coverages
- Manage client renewal expiration lists and avoid any lapse in coverage
- Process proposals, policies, endorsements and audits as needed
- Answer claim questions and provide support, where needed, throughout the claims process
- Foster strong relationship building between the client, carriers and support team
- Delegate work to support team members as appropriate for their specific position
- Attend and participate in internal meetings and complete required training
- Perform other related duties as assigned by management

COMPETENCIES

- Thorough understanding of Commercial Lines insurance law, guidelines, and practices
- Maintain current knowledge of insurance coverages and exposures and the insurance products and markets available to cover the exposures
- Ability to read and interpret documents such as policy forms and insurance contracts
- Solid verbal and written communication skills
- Excellent organizational skills and the ability to multitask
- Ability to work, collaborate, and communicate with individuals at varying levels across the organization
- Strong customer service skills
- Effective time management skills
- Strong computer operating skills and proficiency in Microsoft Office Suite, Zoom, and Applied (EPIC) CMS

EDUCATION & EXPERIENCE

- High school diploma or equivalent
- Bachelor's degree preferred
- 10+ years of national or large account Commercial Lines experience
- State Property & Casualty Insurance License

- ARM, CIC, CPCU or other insurance professional designation preferred
- Min. 1 year of Applied EPIC experience

PHYSICAL REQUIREMENTS

The physical requirements are representative of those that must be met to successfully perform the essential functions of this job.

- Sit at a desk and use a computer for extended periods of time
- Lift and/or move up to 10 pounds and up to 25 pounds on occasion
- Regularly talk to communicate and hear to understand
- Use hands to reach and grasp and use fingers to feel and touch
- Ability to see with close vision and ability to adjust focus

WORK ENVIRONMENT

The work environment characteristics described here are representative of those that may be encountered while performing the essential functions of this job.

Job duties are performed in an indoor office setting with computers, telephones, and copy/print machines. Noise levels are minimal to moderate. Local and non-local travel up to 15%.

WORK LOCATION

- Hybrid Remote in Chandler, AZ

COMMITMENT TO DIVERSITY

As an equal opportunity employer committed to meeting the needs of a multigenerational and multicultural workforce, The Mahoney Group recognizes that a diverse staff, reflective of our community, is an integral and welcome part of a successful and ethical business. We hire talent at all levels regardless of race, color, religion, age, national origin, gender, gender identity, sexual orientation, or disability, and actively foster inclusion in all forms both within our company and across interactions with clients, candidates, and partners.

BENEFITS

- Employee stock ownership plan
- Immediate 401K Matching
- Generous time off policy
- Comprehensive company sponsored health insurance
- Dental and vision insurance
- Life insurance
- Flexible spending and Health Savings Account