

ACCOUNT MANAGER

Department

Commercial Lines

Reports To

Client Services Manager

FLSA Status

Exempt

POSITION SUMMARY

The Commercial Lines Account Manager manages the overall workflow, account servicing, and maintenance of the assigned book(s) of business. This role expands client relationships by analyzing, communicating, and eliminating coverage gaps, ensuring that a client's risk is being managed in an optimal manner.

OBJECTIVES

- Develop and maintain relationships with clients and prospective clients
- Serve as the main point of contact for clients addressing general questions, providing guidance, and resolving accounting discrepancies
- Partner with Advisors to procure, service, and maintain client accounts
- Collaborate with Advisors to identify and recommend coverage to clients and prospects; coordinate the proposal process for new, renewal, and modified insurance coverage
- Review and/or process new and renewal policies, endorsements, audits, audit assignments, cancellations, and similar documents for accuracy
- Educate clients on current and proposed coverage and exclusions
- Answer claim questions and provide support, where needed, throughout the claims process
- Foster strong relationship building between the client and support team
- Advise and guide the service team in their supports of client needs
- 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
- 5 years of Commercial Lines experience
- State Property & Casualty Insurance License
- CISR, CIC or other insurance professional designation
- 1 year of Applied EPIC experience

PHYISCAL 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 may be required.

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.

ACKNOWLEDGEMENT

I have reviewed this job description and I understand all my job duties and responsibilities. I am able to perform the essential functions as outlined.

Employee Name: _____ Date: _____

Employee Signature: _____