

# JOB DESCRIPTION

## SERVICE ACCOUNT MANAGER, COMMERCIAL LINES DEPARTMENT

### Summary

Under the direction of the Vice President, Commercial Risk; provide superior service in expanding and maintaining the Commercial Lines Department client base; analyze and maintain your client book of business by quoting, handling client requests by mail, telephone, fax, email or in person from the policyholders, carrier representatives or others concerning their insurance needs.

### Essential Duties and Responsibilities

Include the following; other duties may be assigned:

- Handle new business process including; rating and quoting, preparing summaries, finalizing marketing, and ordering final policies
- Handle renewal process including; tracking marketing, updating systems, preparing summaries and ordering final policies
- Respond to client and carrier requests and miscellaneous correspondences
- Maintain accurate in-force files on the Agency computer and manually create documents and files; interface all computer generated policies, endorsements, renewals and verify accuracy
- Develop long-term relationships with clients and carrier representatives
- Adhere to Agency policies, procedures, and codes of conduct
- Participate in classes and seminars for skill and knowledge development
- Performs other assigned duties or functions as required to meet business objectives

### Supervisory Responsibilities

There are no supervisory responsibilities for this position.

### Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

- **Problem Solving** - Identifies and resolves problems in a timely manner; gathers and analyzes information skillfully; develops alternative solutions; uses reason even when dealing with emotional topics
- **Written Communication** - Writes clearly and informatively; edits work for spelling and grammar; able to read and interpret written information
- **Planning/Organizing** - Prioritizes and plans work activities; uses time efficiently; plans for additional resources; sets goals and objectives
- **Quality** - Demonstrates accuracy and thoroughness; looks for ways to improve and promote quality

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- **Quantity** - Meets productivity standards; completes work in timely manner; strives to increase productivity and efficiencies; works quickly
- **Safety and Security** - Observes safety and security procedures; reports potentially unsafe conditions; uses equipment and materials properly
- **Adaptability** - Adapts to changes in the work environment; changes approach or method to best fit the situation; able to deal with frequent change, delays, or unexpected events
- **Attendance/Punctuality** - Is consistently at work and on time; ensures work responsibilities are covered when absent; arrives at meetings and appointments on time

## Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- **Education and/or Experience**  
Bachelor's degree (B.A.) from four-year college or university; or four to six years related experience and/or training; or equivalent combination of education and experience
- **Language Skills**  
Ability to read and interpret documents such as insurance contracts and procedure manuals; ability to write routine reports and correspondence; ability to speak effectively before groups of customers or employees of organization
- **Mathematical Skills**  
Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals; ability to compute rate, ratio, and percent and to draw and interpret bar graphs
- **Reasoning Ability**  
Ability to solve practical problems and deal with a variety of variables in situations where only limited standardization exists; ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form
- **Computer Skills**  
Knowledge of Microsoft Office Suite, Internet Explorer, AMS Sagitta, Word Process, or other document management system, Zywave applications, Salesforce, Broker Briefcase, account management system, AgencyFuel reporting, beginner level database management, and spreadsheet software

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- **Certificates/Licenses/Registrations**  
Pennsylvania Driver's License  
Pennsylvania Insurance License
  - Property & Allied Lines
  - Casualty & Allied LinesCommercial Insurance Counselor Desired
- **Other Skills & Abilities**  
N/A
- **Other Qualifications**  
N/A

## **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to stand, walk, sit, use hands and fingers, reach with hands and arms, climb or balance, stoop, kneel, crouch, or crawl, and speak or hear. The employee must occasionally lift and/or move up to 10 pounds and be able to drive a vehicle. Specific vision abilities required by this job include close vision, depth perception, and ability to adjust focus.

## **Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually quiet.