



## Personal Lines Account Manager I

**Position:** Personal Lines Account Manager I

**Location/ Department:** Panama City/ Personal Lines

**Supervisor Title:** Personal Lines Producer

**Supervises (Number of employees supervised):** N/A

**FLSA Status:**  Exempt (exempt from overtime)  Non-Exempt (non-exempt from overtime)

### Job Summary:

The Personal Lines Account Manager I is a mid-level position and is responsible for ensuring personal lines clients receive timely and quality service. Responsibilities are focused on reviewing and accurately troubleshooting client service needs and assisting in the management of clients' insurance policies.

The Personal Lines Account Manager I is expected to have excellent attendance and communication skills, possess the ability to build lasting business relationships, and exhibit professionalism.

### Job Duties and Responsibilities:

- Support Personal Lines Department Producers in routine account maintenance
- Maintain a courteous and effective relationship with clients, co-workers, carriers, and other business contacts
- Maintain all client files in the agency management system with full policy detail and use the system for all transactions and notes
- Respond to client inquiries, incoming mail, company requests and producers' needs on a timely basis
- Collect renewal data on assigned accounts
- Review and order renewals according to agency procedures
- Survey policy coverage's and identifies cross-selling and upgrading opportunities
- Review, analyze and submit applications to insurance companies
- Follow agency's underwriting guidelines
- Prepare quotations, coverage summaries/comparisons, proposals and recommendations needed to ensure clients/prospects understanding and adequacy of coverage
- Review new business, renewals, endorsements to insure items were received as ordered
- Prepare billing following agency's credit and collection policies
- Coverage for the Receptionist at the front desk as needed
- Assist with other clerical tasks within the office as requested
- Participate in courses for insurance/sales skills
- Maintain current knowledge of underwriting requirements of carriers

### Knowledge, Skills and Abilities (KSAs):

- Good oral and written communication skills
- Technical and client relations expertise
- Proficient in Microsoft Suite
- Property casualty commercial lines and bond product knowledge and risk management expertise
- Agency management system computer skills



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**Education and Experience:**

- High School Diploma or Equivalent required
- Three years’ CSR experience or P&C related experience required
- Current License – 4-40 required

**Essential Job Functions:**

- Support agency and assigned producers by placing and processing new business and renewals
- Retain renewals through the provision of quality service
- Support sales and account growth objectives of the agency through cross selling, up selling, making inter departmental referrals and obtaining testimonials and referrals
- Must be able work with a computer for a minimum of 7 hours daily either standing or sitting
- Must be able to read printed materials and computer screen with or without MS or other software accessibility functions
- Must be able to effectively communicate in e-mail, by phone, or in person during the course of the workday

**Review:** This job description will be reviewed annually during your annual performance review. Your inputs will be considered, and you are encouraged to submit any changes that would make this document more accurate. Updated job descriptions will be acknowledged by employee and supervisor.

**AT-WILL EMPLOYER STATEMENT & ACKNOWLEDGEMENT OF RECEIPT OF JOB DESCRIPTION**

Peoples First Insurance is an “At-Will” employer. This means that either the employee or the Company is free to end the employment relationship at any time, for any reason, with or without cause and with or without notice. While positive performance evaluations, commendations, pay raises and longevity of employment are desired objectives, they do not change or alter the At-Will employment relationship.

I \_\_\_\_\_, do hereby acknowledge receipt of Peoples First Insurance job description for the position described above. I have read, understand and am able to perform the duties, responsibilities, and essential job functions of the position with or without reasonable accommodation.

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Supervisor Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_