



**Job Description**

<b>Position Title:</b> Commercial Servicing Lines Account Manager t	
<b>Location/Affiliate:</b> SDN-Amherst	<b>Grade Level:</b> (HR to complete)
<b>Reports To (Title):</b> Director – Commercial Lines	<b>Department:</b> Commercial Lines
<b>Completed By (Name):</b> Dianne Ayers	<b>Date:</b> 7/22/16
<b>FLSA Status:</b> Exempt or Non-Exempt (HR to complete)	
<p><b>Purpose:</b> Why does this position exist? (One or two sentences starting with “The (Job Title) is responsible for...” describing the primary result of the position.)</p> <p>The Commercial Servicing Lines Account Manager is responsible for developing strong relationships with the clients assigned to them by being the primary contact for servicing needs and policy coverage questions including but not limited to :. Review and analysis of client’s current insurance program, offering alternative options and presenting them to the client. Cross sell new insurance products to existing customers and to new prospects received from various sources. Be personally accountable for supporting individual and department goals and initiatives.</p>	

<b>Scope and Direction</b>	
Area of Responsibility:	Commercial Lines – middle & large market
Degree of Supervision Received (Minimal, Moderate or Extensive):	Moderate
From (Title):	Director – Commercial Lines
Degree of Supervision Given (None, Minimal, Moderate or Extensive):	None
To (Title(s)):	However, expect close coordination and teamwork with unit team members and others in Commercial Lines department

<p><b>Essential Functions:</b> The major duties of the job that constitute the fundamental tasks and or responsibilities of the position. Employees must be able to perform the essential functions of the position with or without reasonable accommodations.</p> <p><b>Questions to assist in determining which functions are essential include:</b></p> <ul style="list-style-type: none"> <li>• Is the function a primary reason for which the position was established?</li> <li>• Would removing the function fundamentally change the position, or eliminate the need for the position?</li> <li>• Is transferring the function impossible due to a lack of available employees?</li> <li>• Are there severe consequences if the position is not required to perform the function?</li> <li>• Does the function require specialized expertise?</li> </ul>
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1. Work independently to assume daily servicing responsibility of assigned client relationships in accordance with agency standards and workflows. Servicing duties include renewals, providing summaries, ordering and issuing binders, certificates, policies, Auto ID cards, proposals, invoicing, and other insurance documents.
2. Conduct consultative conversations with a Commercial client base; establish & maintain carrier relationships
3. Obtain non-marketed renewal quotes from existing carriers, completing renewal processes and handle non-renewal and cancellations for cause
4. Prepare and deliver quotes/proposal's for new business or renewal remarketing. Meet and present such designs and recommendations to the client
5. Negotiate, quote and sell additional lines of coverage to existing clients utilizing the appropriate insurance carriers and understanding the underwriting requirements for each carrier being approached
6. Coordinate with department management on special projects as requested
7. Adhere to pertinent laws, regulations, SDN Compliance Policy
8. Develop and maintain close coordination and teamwork with Producers, team members and others in Commercial Lines department
9. Keep abreast of insurance industry changes, communicates changes to client and team members
10. Commitment to maintaining New York State licensing requirements and in continuing education regarding insurance products and designations.
11.

<b>Job-Related Qualifications</b>
<p><b>Education:</b></p> <p>Required: Associates degree or equivalent education and/or work experience in insurance field.</p> <p>Preferred:</p>
<p><b>Prior Experience:</b></p> <p>Required: 3 year Insurance experience in customer service or account management</p> <p>Preferred: 5 + years Insurance experience in customer service or account management</p>
<p><b>Licenses or Accreditation:</b></p> <p>Required: New York State Property/Casualty Brokers License.</p> <p>Preferred: Specialty Area (if applicable):</p>

<p><b>Competencies:</b> Competencies are the measurable or observable knowledge, skills, abilities and behaviors critical to performing the essential functions of the position. List the competencies required to perform the essential functions for the position.</p>
1. Relevant knowledge of commercial property and casualty products, documents, procedures
2. Proficiency with Microsoft Word, Excel, Outlook
3. Experience with agency management systems. Applied / EPIC experience a plus
4. Independence and ability to function well with a team
5. Attention to Detail – Methodical yet able to make decisions decisively
6. Strong organizational/time management skills to prioritize workload to meet time sensitive deadlines
7. Strong verbal, written and interpersonal skills
8. Maintain a positive attitude, even in a fast paced environment
9. Must maintain a valid driver's license, or have transportation available when needed to be able to leave for calls, meetings and/or visits

**Physical Requirements:** Complete the areas below using your best estimates.

In each row, input the % in the box that best describes this position. Add additional requirements as necessary:	<b>OCCASIONAL (0-33%)</b>	<b>FREQUENT (34%-66%)</b>	<b>CONTINUOUS (67%-100%)</b>
Sitting			x
Standing	x		
Walking	x		
Bending/ Stooping		x	
Reaching Overhead	x		
Reaching Forward or Down		x	
Lifting (lbs)	x		
Repetitive Motion			x
Computer Usage			x
Travel (weekly)	x		