



Job Description

Position Title: Commercial Servicing Lines Account Manager – Select & Program Unit	
Location/Affiliate: SDN-Amherst	Grade Level: (HR to complete)
Reports To (Title): Director – Commercial Lines	Department: Commercial Lines
Completed By (Name): Dianne Ayers	Date: 7/10/16
FLSA Status: Exempt or Non-Exempt (HR to complete)	
<p>Purpose: 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 – Select & Program Unit 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>	

Scope and Direction

Area of Responsibility: Commercial Lines Select Accounts and Program Unit

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

Essential Functions: 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.

Questions to assist in determining which functions are essential include:

- Is the function a primary reason for which the position was established?
- Would removing the function fundamentally change the position, or eliminate the need for the position?
- Is transferring the function impossible due to a lack of available employees?
- Are there severe consequences if the position is not required to perform the function?
- Does the function require specialized expertise?

1. Develop and maintain a solid working knowledge of SDN's Select client and Program offerings including knowledge of ,business owners policies, workers compensation and other coverage placements as necessary.
2. 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, audits and other insurance documents.
3. Obtain non-marketed renewal quotes from existing carriers, completing renewal processes and handle non-renewal and cancellations for cause
4. Prepare complete marketing submissions on existing clients as needed
5. Coordinate with department management on special projects as requested
6. Adhere to pertinent laws, regulations, SDN Compliance Policy
7. Develop and maintain close coordination and teamwork with Producers, unit team members and others in Commercial Lines department
8. Commitment to maintaining New York State licensing requirements and in continuing education regarding insurance products and designations.
9.
10.
11.
12.

Job-Related Qualifications
Education: Required: Associates degree or equivalent education and/or work experience in insurance field. Preferred:
Prior Experience: Required: 1 year Insurance experience in customer service or account management

Preferred: 3 + years Insurance experience in customer service or account management
Licenses or Accreditation:
Required: New York State Property/Casualty Brokers License.
Preferred: Specialty Area (if applicable):

Competencies: 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.
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. Strong organizational/time management skills to prioritize workload to meet time sensitive deadlines
6. Strong verbal, written and interpersonal skills
7. Maintain a positive attitude, even in a fast paced environment
8. 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:	OCCASIONAL (0-33%)	FREQUENT (34%-66%)	CONTINUOUS (67%-100%)
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		