



Job Description

Position Title: Commercial Lines Technical Account Manager	
Location/Affiliate: SDN- Amherst	Grade Level: (HR to complete)
Reports To (Title): Director – Commercial Lines	Department: Commercial Lines
Completed By (Name): Dianne Ayers	Date: 7/11/16
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 Lines Technical Account Manager (TAM) is an integral part of the Commercial P&C servicing team responsible for ensuring the consistency , accuracy and quality of agency services, systems and products, TAM assists in all key service aspects of Commercial Clients though technical and clerical support .</p>	

Scope and Direction	
Area of Responsibility:	Commercial Lines Property &* Casualty – middle and large clients
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>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.</p> <p>Questions to assist in determining which functions are essential include:</p> <ul style="list-style-type: none"> • 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?
<p>1. Assist in the process of managing accounts in accordance with agency standards and</p>

workflows.
2. Develop knowledge of carrier websites
3. Retrieve policies, endorsements, audits, cancellations and other coverage documents through carrier websites, when available.
4. Verify and bill policies, endorsements and audits in accordance with agency procedures. Facilitate corrections when necessary
5. Follow up with insurance carriers for open items such as policies, endorsements and audits.
6. Maintains and update electronic files and agency management system to ensure the accuracy and integrity of information.
7. Assist in sorting mail and scanning pertinent documents to client files in the agency management system.
8. Deliver insurance documents to clients via postal and/or electronic mail pursuant to agency protocols.
9. Request Loss information from carriers or carrier websites. Develop loss summaries using loss information as required by account service needs.
10. Assist in the renewal process by initiating requests for updated exposure information and completion of applications in accordance with department workflows.
11. Prepare Auto ID cards, Certificates of Insurance and other daily service needs as assigned
12. Commitment to continuing education in insurance related topics and /or designations.
13. Develop and maintain close coordination and teamwork with Producers, Servicing Account Manager (SAM) and others in Commercial Lines department
14. Coordinate with department management on special projects as requested.
15. Adhere to pertinent laws, regulations, SDN Compliance Policy

Job-Related Qualifications	
Education:	
Required:	Associates Degree and 1 years related work experience in the insurance industry.
Preferred:	3 + years related work experience in the insurance industry

Prior Experience:

Required: Years: Type:

Preferred: Years: Type:

Licenses or Accreditation:

Required: Obtain New York State Brokers License within 12 months of hire.

Preferred: New York State Brokers License.

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. Knowledge of commercial property and casualty products, documents.
2. Proficient 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 deadline
6. Strong verbal, written and interpersonal skills
7. Maintain a positive attitude ,, even in a fast paced environment

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		