

Truex Insurance, Stockton, CA

Position Title: Account Manager-Commercial Lines

Status: Full Time (35 hours per week), Non-Exempt

Reports to: Office Manager

About Truex: Located in Stockton, CA, Truex is a dynamic, independently owned insurance broker specializing in Personal, Business / Commercial, and Life / Health. Our business model is built on developing genuine, life-long relationships with our clients, and on providing excellent customer care at all times. Truex employees are the best at helping people prepare for the worst.

Summary: The Account Manager-Commercial Lines provides assistance to Producers in the processing of new and renewal commercial lines business. Provides in-house customer service to clients as assigned and requested.

Essential Responsibilities:

The successful Commercial Lines Account Manager will:

- 1) Assist in marketing new and renewal business, determine premiums, prepare presentation packets, and maintain underwriting and marketing information by carrier.
- 2) Monitor policy expirations, and work with Producer to secure renewal and/or new business information. Maintains expiration control log.
- 3) Check new and renewal policies for accuracy in rating, typing, coverage, and signatures, and input these transactions to generate billing invoices. Ensure that these items are delivered to the client.
- 4) Process endorsements, change requests, certificates, and binders as requested by the client per established procedures.
- 5) Provide excellent customer service to clients and companies regarding insurance, claims, or administrative problems, providing information, answering questions and creating solutions, or referring to the Producer when appropriate. Provides service that is timely, efficient and effective.
- 6) When appropriate, engage in upselling and/or account rounding in cooperation with the Producer.
- 7) Maintain a suspense system in AMS 360 to follow up on outstanding orders, correspondence, and reports, and follow up accordingly in a timely manner.
- 8) Maintain orderly, current files in a paperless environment, using AMS 360 software.
- 9) Follow agency E & O guidelines.
- 10) Keep abreast of emerging industry information, new products, coverage and technology.
- 11) Perform other projects as assigned.

Knowledge, Skills and Abilities:

The successful Account Manager-Commercial Lines:

- 1) Will work cooperatively and collaboratively with Staff at all levels, and be dedicated to a respectful and collegial work environment.

- 2) Must be a self starter, and a life-long learner. Must have the ability to define problems, collect data, establish facts, and draw conclusions. Must be able to interpret an extensive variety of technical instructions. Constructive thinking and alternative short-to-long term solutions must be considered. Action plans must be developed and implemented.
- 3) Will have a thorough understanding of commercial lines underwriting and coverage.
- 4) Excellent verbal and written communication skills.
- 5) High attention to detail and an ability to work successfully on several projects concurrently.
- 6) Excellent time and task management, and organizational skills.
- 7) Ability to type 55 WPM. Facility with a PC environment, and competence with Microsoft Office Suite. Ability to master Agency Management Software (AMS 360).
- 8) Ability to sit and work at a computer for extended periods of time, type, move about an office environment, and to lift up to 20 pounds occasionally, with reasonable accommodation as needed.

Other Requirements:

- 1) High School diploma.
- 2) College education or equivalent insurance experience.
- 3) Must hold a current California Resident Insurance Producer for Property and Casualty license.
- 4) Property and Casualty (commercial lines) experience required.

Working Conditions:

- 1) Fast-paced, multi-tasking, office environment requiring ongoing learning and complex problem solving.

General:

- 1) This job description is intended to describe the level of work required of the person performing the job.
- 2) Essential functions are outlined; other duties may be assigned as needs arise or as required to support the agency's essential functions.
- 3) This description is not intended as a contract and is subject to unilateral change and revision by management.
- 4) Any written contractual agreements will supersede this job description.
- 5) All requirements may be modified to reasonably accommodate physically or mentally challenged employees.