



## CREATIVE PLANNING

Title: Commercial Lines Account Manager (P&C Insurance)

Location: Overland Park, KS

### Job Description: **JOB SUMMARY**

The **Commercial Lines Account Manager** is responsible for managing the day-to-day processes of customer accounts in order to maintain a long-term relationship and maximize sales opportunities with those accounts. The Account Manager provides prompt, accurate, courteous service to agency customers and works to prevent problems from occurring and to resolve problems that have already occurred or concerns that the customer may have.

The **Commercial Lines Account Manager** provides assistance to Producers in re-marketing existing accounts, providing timely and accurate renewal proposals and other tasks as needed. The Account Manager works with company representatives to obtain renewal quotes from the incumbent carrier to present to the insured or Producer.

***We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.***

### **JOB DUTIES:**

- Receives phone calls from clients and carriers regarding insurance coverage, claims, or administrative problems. Complies with request and/or refers to the Producer per agency's procedures. Documents system according to agency's procedures.
- Updates applications and renewal information as needed to reflect changes during the policy year.
- Requests endorsements from carriers through AMS to document changes to coverages and/or exposures throughout the policy term.
- Resolves discrepancies in endorsements or policies received from the company.
- Submits applications, loss runs, etc. to incumbent carrier and, if instructed to do so by the Producer, to alternative markets for renewal quotes and follows up to ensure timely receipt of quotations.
- Reviews quotes to verify coverages are as requested and match applications submitted. Resolves any discrepancies directly with the underwriter and communicates final quote results to Producer.
- Prepares summaries of insurance, schedules and proposals for Producers/Customers as needed.
- Communicates bind requests per Producer instructions and confirms binding of coverage with carriers and issues binders.
- Issues Auto ID's for new business policies, renewals and all auto changes throughout the policy year.

- Creates master certificates reflecting current coverages for issuance at for new business policies, renewals and as needed throughout the policy year based on changes to coverages.
- Invoices agency-billed policies, endorsements and audits and executes premium finance agreements as needed.
- Assists insureds with audit disputes as needed by reviewing audit worksheets and providing guidance as to how to resolve the dispute.
- Assists clients in submitting first reports of claims, facilitates prompt response from carrier staff and follows up on claims status according to agency procedures.
- Works with Accounting to resolve accounting discrepancies on agency billed policies, collects outstanding premiums on past due invoices, requests cancellations from carrier according to agency's procedures.
- Processes cancellations as requested, determines reasons for request for cancellations, acts to save accounts, follows up on cancellations to ensure accurate, timely resolution, minimizes agency's exposure to unpaid premiums.
- Completes other tasks as requested by Producers as needed – such as premium breakdown summaries, claims narratives, Mod Master analysis, production of reference materials from Broker Briefcase, etc.

**REQUIRED EXPERIENCE/QUALIFICATIONS:**

- Ability to communicate orally and in writing with others to explain complex issues, ability to receive and interpret complex information, and respond appropriately.
- Good listening skills and attention to detail are critical.
- A strong desire to help others with complex insurance problems.
- An ongoing effort to obtain professional designations such as CISR, CIC.
- Ability to manage multiple tasks concurrently and prioritize workload appropriately.
- Ability to make decisions independently.
- Strong relationship-building skills with Producers, companies, customers and co-workers
- Able to be a team player and adapt to a fast-moving, changing work environment with a positive attitude
- Microsoft Office – specifically Excel, Word
- Ability to navigate on the Internet

**PREFERRED EXPERIENCE/QUALIFICATIONS:**

- College education with a minimum of 1 year commercial insurance experience or a minimum of 3 years insurance experience.
- Property and Casualty Insurance Agents License in Kansas or Missouri.
- Knowledge of commercial insurance products and usages.
- Knowledge of insurance rating and underwriting procedures.
- Knowledge of AMS360