



**Position:** Commercial Insurance Account Manager

**Reports to:** Manager of Client Service

**Accountable for:** Servicing an assigned book of commercial accounts and perform new business development duties. Work under general supervision with assigned producers, using independent judgment, in accordance with agency policies and procedures.

***Account Manager Responsibilities:***

- Primary contact for client service.
- Attend client meetings as requested.
- Manage annual renewal process including:
  - Obtain and negotiate renewal quotes.
  - Prepare proposal
  - Bind coverage and update TAM
- Remarket renewal if necessary.
- Experience modification analysis (using ModMaster) by request.
- Final review of processed policies.
- Insured contract review.
- Manage non-pay notices and process finalized cancellations.
- Invoice agency bill policies and endorsements.
- Follow up calls to carriers and insureds for information requests.
- Maintain knowledge of markets.
- Cross sell additional lines of coverage when appropriate.
- Provide coaching, mentorship and assistance to junior team members as needed.
- Obtain change information from insured, request endorsements, update TAM and send confirmation letter to insured – as needed.
- Check and process audits – as needed.
- Back-up departmental teammates.
- Create Renewal Questionnaire, send to insured and follow up – as needed.
- Order loss runs and experience mods for renewals – as needed.
- Prepare replacement cost estimator reports – as needed.
- Prepare renewal submission to incumbent carrier – as needed.
- Policy processing – as needed.
- Issue certificates – as needed.
- Report claims to carriers and manage claim process to resolution – as needed.



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\*"As needed" refers to account co-ordinator responsibilities, however, account managers are required to be able to perform these duties when needed.

***Business Development Responsibilities:***

- Complete professional, agency standard new business submissions to carriers and agree to need by dates and other expectations from producers.
- Submit and follow up with carriers as to status of quotes, communicate with producers regarding additional info needed and status of account.
- Responsible for rating of new and remarketed business and negotiate pricing, terms and conditions.
- Prepare proposals, deliver to Producers and attend new business meetings when requested.
- Bind new business with the carriers and follow New Business Binding Checklist.
- Attend internal and external assigned carrier meetings, maintain assigned carrier Agency Library file and provide input to Manager of Client Service, CEO and Producers about new opportunities in the marketplace.
- Build and maintain excellent relationships with carriers based on trust and mutual production goals.
- Responsible for updating and maintaining commercial lines new business report for your assigned book of business and new business opportunities.

**Agency Standards:**

- Maintain insurance license through continuing education, if applicable.
- Microsoft Outlook - under control/items attached. (< 250 emails in inbox; < 1,000 emails in deleted; < 1,000 emails in sent).
- Follow all BakerHopp Insurance Group internal processes and procedures.
- Respond to internal and external requests (any and all forms) in a timely manner (within 24 hours).
- Excels in all areas of the BakerHopp Insurance Group Core Values (Raise the BAR) and Core Focus: We contribute to the success of others, in all internal and external activities.
  - We **B**elieve in who we are and where we are going
  - We are **A**ccountable. We do what we say we will do.
  - We **B**uild **R**elationships. We are passionate about building strong relationships with our team, clients, insurance companies, community and our families.
- Keep workspace / files / documentation neat, organized and detailed (paper or electronic).
- Maintain timely and accurate information in Applied/Tam including but not limited to:
  - Review and update TAM activities daily.



- Provide detailed documentation of all transactions, emails and conversations.
- Scan and attach all documentation.
- Responsible for attending and participating in department Level 10 meetings
- Responsible for assisting with the creation of a personal rock(s) and completing on a quarterly basis.
- Contribute to and provide new innovative ideas.
- Foster teamwork: work cooperatively and effectively with others that enhance organizational effectiveness.
- Conduct yourself in a courteous and professional manner at all times and with all clients, companies, vendors and co-workers.
- Work displays accuracy, thoroughness and neatness.
- Coach and Mentor

**Qualifications:**

- Valid Property & Casualty License.
- 5+ years' commercial lines experience.
- CISR, CIC, CRM or CPCU designation preferred.
- Excellent oral and written communication skills