



Position: Entrepreneurial Business Unit (small business) Account Manager

Reports to: Director of Client Service

Accountable for: Servicing and overall performance of the agency's Entrepreneurial Business Unit and providing support to the Middle Market Account Managers.

Account Manager Responsibilities:

- Direct contact for client service.
- Manage requests for and process Certificates of Insurance documents.
- Manage requests for and process Evidence of Property documents.
- Manage the renewal process to meet delivery of renewal policy 30 days in advance according to agency guidelines.
- Perform all necessary remarketing activities related to existing EBU clients, as needed or required.
- Prepare Replacement Cost Estimator reports.
- Retrieve loss runs.
- Binding of renewal policies with carriers including updating TAM.
- Invoice agency bill policies and endorsements.
- Experience Modification analysis (using ModMaster) if required.
- Prepare Proposals.
- Policy checking.
- Obtain change information from insured, request endorsements, update TAM, send confirmation letter to insured.
- Process endorsements.
- Manage non-pay notices and process finalized cancellations.
- Follow up calls to carriers and insureds for information requests.
- Obtain change information from insured and process.
- Contract review.
- Report claims to carriers and manage claim process to resolution.
- Cross sell additional lines of coverage.
- Maintain knowledge of markets.
- Attend client meetings as requested.
- Primary back-up for AM during an absence.

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.



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- 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:

- Currently valid Property & Casualty License.
- Commercial lines experience in an independent agency
- Excellent oral and written communication skills
- Team player with a positive attitude