

Griffin Owens Insurance Group
Position Description

Title: Account Manager

Program: Personal and/or Commercial Lines

Reports To: Lead Office Coordinator or Commercial Lines Manager

Position Summary: Assists mainly in the servicing and retention of existing accounts. Provides prompt, efficient, high-quality service to designated accounts in support of Account Executives' activities.

Essential Job Functions:

- Assists Account Executives in rounding out accounts by reviewing current account policy limits and coverages. Makes recommendations on changes needed to policy limits, additional coverages and/or additional policies.
- Assists Account Executives and/or follows-up on outstanding claims and aids in claims resolution as necessary.
- Assists Account Executives with application rewrites and/or transfers.
- Maintains timely customer and carrier interactions to minimize the potential for errors and omissions claims and thoroughly explains coverages and exclusions.
- Completes change and endorsement requests within 24 hours of receipt or sooner if necessary.
- Receives and distributes all terminations and cancellations to determine appropriate action within 72 hours of receipt. Requests cancellation of policies when necessary.
- Processes premium payments and assist in billing issues.
- Maintains current client information and updates client management system/s.
- Maintains confidentiality of all information related to clients, customers, employees and carriers.
- Follows agency best practices for coverage recommendations, service processes and file documentation.
- Creates accurate and timely contact records for all client and carrier conversations and transactions.
- Maintains working knowledge of all rating products and processes.
- Provides clerical backup/support for receptionist and other administrative staff as needed.
- Consistently reports to work on time and prepared to perform the essential job functions.
- Performs other functions as assigned by management.

Knowledge, Skills and Abilities

- Must be self-motivated with initiative, integrity, thoughtfulness and an ability to communicate effectively with others using effective verbal and written presentation skills.
- Achievement-oriented, conscientious with strong attention to detail and ability to work in a fast-paced and ever-changing work environment
- Must be organized with excellent follow-through skills and a have a desire for professional growth by participating in industry-sponsored educational programs.

Knowledge, Skills and Abilities cont.

- Must maintain a positive and respectful attitude with colleagues and clients and work as a team member to achieve both individual and agency goals.

Working Conditions/Environment

- Fast-paced multitasking office environment. Employees are provided a dedicated workstation with basic ergonomic set up features, such as an ergonomic keyboard and mouse, dual monitors, and an adjustable chair. Workstation accommodations and adjustments are provided upon request and evaluation.

Physical Requirements

- Must be physically able to work a minimum of 40 hours per week (or less if part-time) in the office. The employee is regularly required to see, hear, and project voice well enough without amplification. There is frequent need for the employee to stand, sit, walk, use repetitive small motor activity, use hands and fingers, and reach with hands and arms. The employee is occasionally required to lift and carry up to 30 pounds; to stoop, kneel, crouch, or crawl and to ascend and descend stairs. This position requires a high-energy level and ability to handle stress-related situations daily. The employee may be required to drive and travel unaccompanied in diverse weather conditions.

Other Requirements (Prerequisites)

- Ability to use a personal computer, calculator, agency automation system, and demonstrate proficiency in various software programs, including but not limited to all Microsoft Office software suite programs.
- Candidate must submit to a drug/alcohol screen, satisfactorily complete pre-hire employment assessments and maintain a satisfactory driving record. A civil and criminal history background check will be performed at the company's expense. Physical attendance is required at mandatory company meetings. Employees are encouraged to attend relevant and/or mandatory company meetings and to pursue relevant professional designations; however, this is not required.

Applicable Laws

This employer complies with applicable federal, state, and local laws governing nondiscrimination in employment in every location in which the company has facilities.

- ADA: The employer will make reasonable accommodations in compliance with the Americans with Disability Act of 1990.
- EEO: This is an equal opportunity employer. The agency provides equal employment opportunities to all employees and applicants for employment without regard to race, color religion, sex, national origin, age, disability, or genetics.
- OSHA: The employer will comply with OSHA requirements as applicable.

Closing

- This job description is not intended as a contract and is subject to unilateral change and revision by management with or without prior notice at any time. Any written contractual agreements will supersede this job description.

I have read, understand, and agree to abide by the job description.

Signature

Date

Printed name