

Note: Construct your listing so it will be listed in results from searches conducted by the candidates you want. Use specific phrases such as “commercial insurance account manager,” quotes included. Include wording that communicates your unique value proposition as an employer. All criteria you advertise for the position should be job-related, or what are called bona fide job qualifications. This means that the requirements for candidates are necessary to success in the job, as performed by people in similar positions.

Avoid terms related to gender, age, race, religion, physical attributes, national origin or ethnicity. Generally, you cannot use the argument that you want someone who will be acceptable to your client base as a basis for hiring, but you can require special skills needed to deal with clients and prospects, such as knowledge of a language other than English.

Require that resumes be submitted by all applicants via e-mail. This will force candidates to demonstrate a minimal level of computer savvy and make it easier to respond for you to respond that if they meet the basic qualifications, you will contact them for an interview. If candidates find your phone number, provide as little information over the phone as possible. Ask them to e-mail a resume.

CSR/Account Manager

General Information

Job Title: Account Manager
Job Location: Lincoln, NE
Job Type: Full-time Exempt
Compensation: \$27,000 to \$34,000
Reports to: Department Manager
Subordinates: None

Job Description

The XYZ Insurance Agency is a leading independent insurance agency dedicated to helping its customers protect their ability to realize their personal and business goals. XYZ provides insurance and risk management services to over 1000 individuals, families and businesses.

The CSR/Account Manager is responsible for helping agency customers understand their risks, identify ways to be protected and secure the best possible solutions.

Responsibilities

- Proactively expand our reach to qualified prospects and existing customers using multiple proven and creative techniques including cross selling, up-selling and obtaining referrals.
- Enthusiastically identify customer exposures to loss using agency tools such as exposure checklists, coverage questionnaires and accord applications.
- Aggressively secure best coverage and value from companies available to the customer through the agency.
- Diligently review all policies and documents pertaining to customer coverage and service to ensure accuracy.

- Communicate in a timely manner with all parties regarding customer transactions including customer, carriers, third parties and other agency personnel as necessary to ensure quality control and minimize errors and omissions.
- Thoroughly document all activities performed on behalf of the customer in appropriate paper and electronic mechanisms.
- Adhere to all agency operating procedures but recommend opportunities for improvements when necessary.

Job Requirements

REQUIRED KNOWLEDGE/EXPERIENCE

- 2+ years of insurance customer service or account management
- Extensive understanding of account exposures, insurance coverages and quoting process.

EDUCATION

- High School diploma or GED, college preferred.

CAPABILITIES

- Excellent leadership skills with a strong service orientation
- Enthusiastic relationship builder
- Ability to multitask, organize and prioritize within a fast paced, rigorous environment.
- Proven sourcing skills, including networking, database mining and partnering with search firms and educational institutions.
- Able to think strategically and analyze data / information that achieves results.
- Results oriented with strong sense of initiative and urgency.
- Flexible, objective and professional.
- Familiar with agency management systems and proficient in Microsoft Office.
- Capable of communicating effectively with a variety of personality styles
- Additional requirements detailed in written job descriptions which may be modified reasonably to accommodate physically or mentally challenged staff members.

SUCCESS METRICS:

- Number of clients and policies per account.
- Amount of revenue per account.
- Policy retention.
- Quality of customer relationships.
- Perceived by customers to be accessible and dedicated to their protection.
- Appreciated and valued by co-workers.