



## POSITION DESCRIPTION

<b>POSITION</b>	<b>Account Manager, Commercial Lines</b>	
	Title	Account Manager, Commercial Lines
<b>ORGANIZATION INFORMATION</b>	Department(s)	Commercial Lines
	Reports to:	Commercial Lines Director
	Supports:	Director of Commercial Lines, Account Executives, Branch Managers
	Reporting Positions	N/A
	# of Direct Reports	N/A
<b>GENERAL SUMMARY</b>	Provide exceptional service to current and prospective clients while maintaining high levels of retention. Responsible for the successful management of commercial accounts based on thorough knowledge of products and services.	
<b>DUTIES and RESPONSIBILITIES</b>	<p><b>General Duties:</b></p> <ul style="list-style-type: none"> <li>• Review incoming mail and organize by priority</li> <li>• Issue policy change requests and cancellation requests and submit to insurers, following up where required</li> <li>• Submit New Business applications/binders to insurers, following up for policies as required</li> <li>• Review for accuracy and transact policy changes, cancellations, renewals and new business and send to insureds with appropriate correspondence</li> <li>• Issue certificates of insurance/confirmations of coverage as required</li> <li>• Market New Business to various insurers</li> <li>• Re-market renewals to various insurers</li> <li>• Review policies and recommend coverages to existing clients</li> <li>• Sell, upsell and cross sell products to new and existing clients</li> <li>• File Maintenance</li> <li>• Print policy documents and payment notices received electronically</li> <li>• Communicate with account executives, clients and underwriters to obtain/update needed information, following up where required</li> <li>• Review incoming email correspondence, voicemail messages, respond appropriately and in a timely manner</li> <li>• Answer incoming calls</li> <li>• Prepare and issue new and renewal policies and policy amendments for some programs</li> <li>• Review Insurance Requirements in leases and contracts</li> <li>• Obtain financing terms for clients as required</li> <li>• Respond to client inquiries via phone, email and in person</li> <li>• Intake of claim reports from clients, submit to insurers</li> <li>• Create new business and renewal proposals as required</li> <li>• Create new business and renewal binders as required</li> </ul>	

## POSITION DESCRIPTION

	<ul style="list-style-type: none"> <li>• Create customer and policy files in Power Broker</li> <li>• Maintain new business list, cancellation list, quote log</li> <li>• Create insurance summaries, market surveys, enclosure letters</li> <li>• Follow up on outstanding abeyances</li> <li>• Remain up to date on various insurer products and offerings</li> <li>• Maintain minimum education requirements</li> <li>• Other duties as assigned by supervisors</li> </ul>	
<b>SUPERVISORY RESPONSIBILITIES</b>	N/A	
<b>FINANCIAL RESPONSIBILITIES</b>	<ul style="list-style-type: none"> <li>• Complete accounting tasks including: post payments, payment collection; request trust cheques from the Controller, calculating sub broker commissions</li> </ul>	
<b>COMMUNICATION</b>	<b>Corporation/Department</b>	
	External	<ul style="list-style-type: none"> <li>• Insurer Representatives</li> <li>• Clients</li> <li>• Premium Financing Companies</li> <li>• General Public</li> </ul>
	<b>Department/Position</b>	
	Internal	<ul style="list-style-type: none"> <li>• All employees</li> </ul>
<b>JOB REQUIREMENTS</b>	Education Level	High School Diploma Registered Insurance Brokers of Ontario licence (RIBO) CAIB, CIP or other insurance designation preferred
	Computer Skills	<ul style="list-style-type: none"> <li>• Internet research</li> <li>• Reliable entry of data to Company portals</li> <li>• Use of any specialized Management System software (Policy Works, Power Broker, Applied Rating)</li> <li>• MS Office Applications</li> </ul>
	Key Knowledge, Skills and Abilities	<ul style="list-style-type: none"> <li>• Advanced knowledge of insurance markets and reference to markets</li> <li>• Reading and comprehension of specialized and detailed materials such as: agreements, contracts, leases, policy wording</li> <li>• Excellent customer service skills</li> <li>• Sales Skills</li> <li>• Interpersonal communication skills</li> <li>• Excellent oral and written communication skills</li> <li>• Organizational and time management skills</li> <li>• Mathematical skills (transacting charges and</li> </ul>

## POSITION DESCRIPTION

		<p>credit, calculate percentages, ratios, averages and premium rates)</p> <ul style="list-style-type: none"> <li>• Ability to multi task</li> <li>• Proven analytical skills</li> <li>• Relationship management capabilities</li> </ul>
	Professional Experience	2 or more years of Commercial Insurance experience
	Working Conditions	Office Environment
<b>COMPETENCIES</b>	<p><b>Teamwork &amp; Co-operation</b></p> <p><u>Encourages Participation:</u> Proactively looks for solutions by involving others to resolve issues. Readily supports, provides ideas and encourages two-way feedback. Actively checks for understanding when communicating with colleagues. Encourages team and promotes team accomplishments.</p> <p><b>Continuous learning and improvement</b></p> <p><u>Seeks Learning Opportunities:</u> Actively pursues technical and behavioural self-development on an ongoing basis. Sets challenging goals and standards of excellence. Demonstrates keen interest to learn and gets involved in tasks that allow for the development of skills and abilities.</p> <p><b>Listening, understanding and responding</b></p> <p><u>Takes Initiative to Face Barriers to Communication:</u> Sets clear focus, clarify rationale, and checks for comprehension to resolve communication issues. Manages own body language and style effectively to adapt to the communication needs of the audience. Addresses concerns in a way that gets "buy-in" and proposals for solutions from co-workers. Perseveres in looking for the most adequate communication technique to tackle obstacles.</p> <p><b>Client Service Focus</b></p> <p><u>Exceeds Client Needs and Builds Long Term Loyalty:</u> Explores new opportunities to propose value added services to customers. Thinks resourcefully in providing excellent customer service. Actively seeks feedback from customers after service is delivered. Analyzes customer trends and pre-plans actions to address needs of existing and potential customers.</p>	

## POSITION DESCRIPTION

### **Integrity**

Encourages Integrity & Ethics: Recommends solutions that win the trust and support of others. Promotes trust, transparency and encourages confidence in others. Creates an environment filled with honesty, accountability and the pursuit of aligned objectives.

### **Accepts Responsibility**

Acts and Takes Full Responsibility: Meets performance expectations consistently while demonstrating appropriate behaviours. Takes reasonable risks and takes accountability for decisions, and deliverables. Monitors performance and learns from the achievement of objectives on a regular basis.

### **Organizational Commitment**

Demonstrates Organizational Commitment: Consistently keeps organizational objectives at the top of one's personal priorities. Describes organisational issues accurately and attends to the needs of stakeholders in a timely manner.

### **Initiative**

Resolves Crisis Situations Promptly: Reacts quickly to address a crisis situation, drawing on appropriate resources and proven experience. Changes work systems and processes to make performance improvements. Implements contingency plans, tracks work in progress proactively and accepts responsibility for taking action.