



## POSITION DESCRIPTION

<b>POSITION</b>	<b>Account Manager, Personal Lines</b>	
	Title	Account Manager, Personal Lines
<b>ORGANIZATION INFORMATION</b>	Department(s)	Personal Lines Manager / Branch Manager
	Reports to:	Branch Manager
	Supports:	Director Commercial Lines
	Reporting Positions	N/A
	# of Direct Reports	N/A
<b>GENERAL SUMMARY</b>	<p>Build lasting long-term business relationships by developing trust and providing consistent personalized financial service to meet client needs. Provide potential and existing clients with professional advice and financial solutions to reach their goals. Maintain quality relationships with all clients by educating them on insurance matters and providing well-rounded advice based on individual needs. Identify growth opportunities and generate referrals in order to grow your business.</p>	
<b>DUTIES and RESPONSIBILITIES</b>	<p><b>General Duties:</b></p> <ul style="list-style-type: none"> <li>• Collect client payments</li> <li>• Draft written correspondence including emails, memos, and letters</li> <li>• Attend to and follow up on emails and phone calls</li> <li>• Print email correspondence and attach to client files</li> <li>• Refer overflow quotes to another office or to producers</li> <li>• Quote and remarket various policies</li> <li>• Use Company Portals to complete endorsements, make payments and issue new business.</li> <li>• Enter payments into accounts receivable, prepare deposits for submission to accounting department, and take deposits to bank</li> <li>• Review and verify new business for producers and salespersons</li> <li>• Book client appointments</li> <li>• Educate clients on insurance matters that apply to them</li> <li>• Resolve client complaints</li> <li>• Recommend insurance solutions to clients based on their needs</li> <li>• Perform inspections</li> <li>• Reconcile accounts to correct commission percentage or premium</li> <li>• Issue insurance confirmation</li> <li>• Report claims to insurance companies and deal with adjusters on behalf of clients if necessary</li> <li>• Prepare mail for courier and Canada Post</li> <li>• Sort mail – inter-office/courier/Canada Post, etc.</li> <li>• Maintain sufficient supplies (i.e. company envelopes for companies for courier and updates, and sufficient postage for mail machine/meter)</li> <li>• Complete quotes for renewals, endorsements and new applications</li> <li>• Review new business, renewals and endorsements for accuracy and</li> </ul>	



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	<p>make corrections if necessary</p> <ul style="list-style-type: none"> <li>• Review and correct if necessary Farm and Commercial policies</li> <li>• Work on Commercial files as necessary, including change requests, renewals, endorsements, payments, telephone calls, reminders, cancellations (required mainly for Branch offices)</li> <li>• Communicate with Underwriters and Accounting Departments</li> <li>• Discuss payment issues with clients when necessary</li> <li>• Carry out change requests</li> <li>• Greet and accommodate to clients</li> <li>• Respond to client requests in a timely manner</li> <li>• Send out and follow-up to collect required documents and forms from clients as required by companies</li> <li>• Advise and follow-up with clients regarding recommendations made by companies and ensure completion by company deadlines</li> <li>• Obtain MVRs &amp; A+ reports</li> <li>• Maintaining new business, cancellation logs and MVR/A+ logs</li> <li>• Answer and transfer calls to the appropriate individual</li> <li>• Participate in ongoing education by attending seminars, webinars and self-study</li> <li>• Train new staff</li> <li>• Keep Broker management up to date and billing policies and endorsements</li> <li>• Attend to instructions from emails and requests from clients, underwriters at companies</li> <li>• Attend and solve increased premiums, cancellations, claim issues</li> <li>• Telephone reception</li> <li>• EDOCS – sorting/printing documents</li> <li>• Home evaluators</li> <li>• Branch office building maintenance</li> <li>• Other duties as assigned</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</li> </ul>	
<b>COMMUNICATION</b>	External	<b>Corporation/Department</b> <ul style="list-style-type: none"> <li>• Salespersons</li> <li>• Business representatives</li> <li>• Contractor/Suppliers/Markets</li> <li>• General Public</li> <li>• Clients</li> </ul>

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		Department/Position
	Internal	<ul style="list-style-type: none"> <li>Employees in your department</li> </ul>
<b>JOB REQUIREMENTS</b>	Education Level	High School Diploma + Registered Insurance Brokers of Ontario License (RIBO) + CAIB & AIC is an added plus
	Computer Skills	<ul style="list-style-type: none"> <li>Data search and entry</li> <li>Create and modify written correspondence and documents</li> <li>Entry of data to Company portals</li> <li>Use of specialized management system software (Power Broker, Applied Systems, Broker quoting system)</li> <li>MS Office Applications</li> </ul>
	Key Knowledge, Skills and Abilities	<ul style="list-style-type: none"> <li>Exceptional customer service capabilities</li> <li>Interpersonal communication skills</li> <li>Excellent oral and written communication skills</li> <li>Organizational and time management skills</li> <li>Policy and/or legal agreement/contract interpretation</li> <li>Mathematical skills (calculate percentages, ratios, averages, premium rates, use of formulas and pre-established equations)</li> <li>Relationship management capabilities</li> </ul>
	Professional Experience	3 to 5 years Personal Lines 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>	

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### **Listening, understanding and responding**

Takes Initiative to Face Barriers to Communication: 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.

### **Client Service Focus**

Exceeds Client Needs and Builds Long Term Loyalty: 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.

### **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.



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	<p><b>Initiative</b></p> <p><u>Resolves Crisis Situations Promptly:</u> 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.</p>
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Prepared by	Date	Revision No	Revision Date	Approved by
ENGAGE HR™	April 4 <sup>th</sup> , 2016	1	April 1 <sup>st</sup> , 2016	JO