



## Job Description

<b>Job Title</b>	Account Manager	<b>Original Date</b>	July 2018
<b>Department</b>	Personal Lines / Programs	<b>Revision Date</b>	June 2023
<b>Reports to</b>	Sales & Underwriting Manager	<b>Position Type</b>	Full-time/Salary
<b>Exempt Status</b>	Non-Exempt	<b>Commissionable - No</b>	<b>Bonus - Yes</b>

**JOB SUMMARY:** As the guardian of the post bind experience, the Account Manager is responsible for maintaining compliance and policy retention through reviewing and processing inspections, endorsements and other account files. This role actively underwrites current policies to support Concorde and carriers standards and strives to retain policies through remediation and remarketing.

### CORE VALUES BEHAVIORS TO MEASURE PERFORMANCE

Communicates Effectively, Demonstrates and Promotes Teamwork, Builds, Maintains and Leverages Relationships, Builds Professional & Personal Growth, Demonstrates Commitment to Excellence and Servant Leadership.

### KEY RESPONSIBILITIES

- Retain existing accounts through remediation and remarketing efforts.
- Assist with placement of risk in appropriate program to improve post bind experience.
- Courteously field and respond to all inquiries from our Trusted Partners in a timely manner.
- Review and process required workflow tasks within ALIS in a timely manner to enhance customer experience.
- Accurately document and maintain all customer interactions in the proper system(s).
- Follow-up on additional information requests for inspections, endorsement, non-renewals and notice of cancellations as needed.
- Utilize industry knowledge to make underwriting exceptions to retain a profitable book of business.
- Maintain a high level of competency on carrier and internal rating systems and products.
- Ensure service levels within the team and department are met or exceeded daily.
- Other duties as assigned.

### EDUCATION, EXPERIENCE, LICENSURE & CERTIFICATION

- Associates or Bachelor's degree preferred, but will consider an equivalent combination of education and experience.
- Minimum 3 years of insurance industry experience required.
- Previous account management, underwriting or agency experience is required.
- Associated classes or courses and/or industry license, or designations desired.

### KNOWLEDGE, SKILLS & ABILITIES

- Ability to provide "CGA Experience" when handling inquiries from our Trusted Partners and team members.
- Must have a high level of problem-solving and organizational skills and be a positive, collaborative, team player.
- Excellent interpersonal and communication skills.
- Attention to detail in composing, typing and proofing materials, establishing priorities and meeting deadlines.
- Ability to understand insurance basics to expand understanding of agent and customer needs and enhance phone and email support for all lines of coverage.
- Ability to prioritize competing demands.

### SYSTEMS:

- Microsoft Office 365
- Monster Phone System
- ALIS Agency Management System
- CGA Website including company online rating systems
- Policy Viewer

- Vertifore

## **SUPERVISORY RESPONSIBILITY**

This position has no supervisory responsibilities.

## **PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to talk or hear and must have the ability to see details at close range. The employee frequently is required to sit for long periods of time while using a keyboard and mouse repetitively and to occasionally walk and/or stand while having frequent interaction with others through telephone, face-to-face, email or otherwise.

**TRAVEL:** Some travel may be required for company training and/or meetings and industry conventions.

**WORK CONDITIONS AND WORK ENVIRONMENT:** This job operates in a professional office environment or home office setting. Work is performed in a temperature-controlled, non-smoking office. The noise level in the work environment is usually quiet. This role routinely uses standard office equipment such as computers, phones, printers/copiers, scanners, and fax machines. For those who will be remote based, the home office set up must be compliant with our remote work policy.

**GENERAL NOTES:** This job description is not intended to be all-inclusive, additional details will be specified by the manager/supervisor. The employee will also perform other reasonable business duties as assigned by the manager/supervisor. Management reserves the right to change this job description, job responsibilities, duties, and working hours as needs prevail, with or without notice.

If requested in accordance with applicable law, the Company provides reasonable accommodation to known physical and mental limitations of an otherwise qualified employee with a disability to allow him/her to perform essential functions of the job unless the accommodation would impose an undue hardship on the Company.

The Company is an at-will employer. This job description is a guideline and does not constitute a written or implied employment contract.

I have read and understand this job description. I agree to accept the responsibilities and duties as outlined.

**Employee Acceptance**

**Date**

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