
Position:	Account Manager	Branch:	Ottawa
Department:	Commercial Lines	Status:	Full Time
Reports To:	Manager, Commercial Lines	Direct Reports:	None

Primary Role Responsibilities and Accountabilities:

The Account Manager position assists the Commercial Lines department in meeting service level objectives by solidifying client relationships, by providing superior customer service, updating client information, producing quality documents and providing support to the Producers as required.

Major Responsibilities:

1. Service a portfolio of commercial lines accounts, including but not limited to responding to phone calls, emails, faxes from clients and insurers regarding insurance, claims, or administrative issues and addressing the request.
2. Assisting account producers with the marketing and/or placement of any new business submission under a \$20,000 premium threshold.
3. Manage policy expirations to obtain renewal information, negotiate with insurers for optimal renewal terms and provide clients with renewal options and details in a timely fashion.
4. Prepare account summaries and renewal presentations as required including premium financing options for all renewal premiums
5. Maintain electronic files and documentation in an orderly, up to date manner based on PBL procedures.
6. Assist Producers(s) and other departments in cross selling and up-selling account rounding.
7. Keep Producers(s) fully informed of any important development on their accounts.
8. Assist other team members from time to time as requested in order to ensure team goals are achieved.

Qualifications:

1. 5+ years' brokerage experience as a Commercial Account Manager
2. RIBO license required. CIP and/or other insurance designations would be an asset.
3. Bilingual (French/English) is an asset.
4. Proven above average written and verbal communication
5. Working knowledge of TAM is an asset.
6. Proficient in Microsoft Office
7. Strong attention to detail and accuracy
8. Ability to manage multiple tasks concurrently and timely follow-up on uncompleted tasks
9. Demonstrated success working in a fast paced and electronic file environment

Qualified candidates are encouraged to apply by submitting your cover letter and resume to careers@pblinsurance.com quoting job #**O17-02**

PBL is an equal opportunity employer and is committed to providing employment accommodation in accordance with the *Ontario Human Rights Code* and the *Accessibility for Ontarians with Disabilities Act*. Please advise HR if you require accommodation.

Internal and external recruiting will occur simultaneously and we will gladly accept external candidate referrals for this exciting opportunity as well. Please see the Employee Handbook for referral requirements.

A successful referral could earn you a Referral Award of up to \$1,000 for this position!

