
Position:	Account Manager	Branch:	Sudbury
Department:	Personal Lines	Status:	Full Time
Reports To:	Team Leader - Personal Lines	Direct Reports:	None

Primary Role Responsibilities and Accountabilities:

Providing excellent customer service to clients; addressing customer needs, making coverage recommendations, processing endorsements and managing policy renewals in the Personal Lines department.

Major Responsibilities:

1. Deal professionally with all incoming and outgoing communication (phone, e-mail, written correspondence) from internal and external clients regarding insurance, claims, or administrative problems; comply with the request according to established corporate procedures and timelines.
2. Foster and encourage positive working relationships with underwriting partners, understand and utilize insurer contacts appropriately, and be approachable to underwriters.
3. Review policy renewals for discrepancies or premium changes and follow company procedures regarding renewal management.
4. Maintain electronic files and documentation in an orderly, up to date manner based on PBL procedures.
5. Maintain an abeyance system to follow-up on outstanding request, payments, correspondence, reports, and follow-up on overdue items according to accepted timelines.
6. Identify and access cross-selling and up-selling opportunities with clients.
7. Refer new business requests as directed by the Personal Lines Team Leader and/or Manager.
8. Accurate scanning and forwarding of electronic files to correct staff member(s).
9. Special projects and miscellaneous duties at management request.
10. Assist other team members from time to time as requested in order to ensure team goals are achieved.

Minimum Qualifications:

1. Post-secondary education is an asset
2. RIBO license in good standing.
3. 1-2 years' experience as an Account Manager in Personal Lines.
4. Bilingual in French and English is an asset.
5. Working knowledge of Agency Manager (TAM) or PowerSoft is an asset
6. Excellent computer skills and willingness to learn new computer software
7. Exceptional customer service skills.
8. Strong interpersonal and telephone skills.
9. Ability to manage multiple tasks concurrently and timely follow-up on uncompleted tasks
10. 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 #S17-06

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!