

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

Primary Role Responsibilities and Accountabilities:

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

Major Responsibilities:

1. Service commercial lines accounts, including but not limited to receiving phone calls, emails, faxes from clients and insurers regarding insurance, claims, or administrative problems and complying with the request.
2. Maintain electronic files in an orderly, up to date manner.
3. Keep detailed records on all client activity in TAM accurately and on a timely basis.
4. Coordinate expirations to obtain renewal information.
5. Negotiate with insurers for renewal premium and coverage changes.
6. Prepare account summaries and renewal presentations as required including premium financing option with finance provider for all renewals.
7. Prepare new business proposals.
8. Review coverage requirements.
9. Assist Producers(s) and other departments in cross selling and up-selling account rounding.
10. Keep Producers(s) fully informed of any important development on their accounts.

Qualifications:

1. 5 – 8 years' experience in the insurance industry, as a commercial account manager.
2. RIBO license in good standing.
3. Bilingual in French and English is an asset.
4. Working knowledge of Agency Manager (TAM) is an asset.
5. Excellent computer skills and willingness to learn new computer software.
6. Exceptional customer service skills, strong interpersonal and telephone skills.
7. Ability to manage multiple tasks concurrently and timely follow-up on uncompleted tasks.
8. 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 #W18-02

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