

## PROPERTY & CASUALTY – COMMERCIAL LINES CLIENT MANAGER JOB DESCRIPTION

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Provide assistance to Producers and Client Executives in servicing new and renewal business. Promptly and professionally assist clients with daily service needs. Regular interaction with Producers, Client Executives and carrier representatives to deliver a superior client service experience.

### REPORTS TO

Client Executive – Commercial Lines Team Leader

### CLASSIFICATION

Exempt

### ESSENTIAL FUNCTIONS

- Has ultimate responsibility for the timely and accurate completion of the following: prepare binders, certificates, auto identification cards, endorsements, audits, policies, lost policy release, and account balance status as needed.
- Has ultimate responsibility for the timely and accurate completion of preparing all invoice transactions including preparation of premium finance agreements.
- Assist the Client Executive with informing and educating clients regarding policy coverage, changes, exclusions and other important policy information.
- Preparation of insurance summaries.
- Assist the Client Executive and/or Producer in contacting clients to obtain updated renewal information and completing application for renewal business within 90-120 of policy expiration.
- Assist the Client Executive with the overall marketing process (strategy, arranging submission, negotiating, reviewing quote options, and developing appropriate presentation documents).
- Maintain expiration log of existing assigned book of business.
- Assist the Producer and Client Executive in placing new business.
- Exhibits proficiency in using the agency management system (Epic), per TFG's written workflows.
- Adhere to all agency procedures and E&O guidelines.
- Maintain the integrity of all electronic files by documenting all activity correspondence, phone calls, faxes, and request for changes, thank you cards, etc.
- Participate in special projects and other duties assigned.

### COMPETENCIES

- Ethical Conduct



- Strong Computer Skills
- Strategic Thinking
- Decision Making
- Communications Proficiency
- Presentation Skills

### **REQUIRED EDUCATION AND EXPERIENCE**

- High School diploma or GED
- Minimum of at least 5 years of experience in similar position
- Active Ohio P&C license
- Knowledge of commercial lines coverage

### **PREFERRED EDUCATION AND EXPERIENCE**

- B.S. Degree
- Experience using Applied EPIC agency management system
- Advanced technical education in attainment of insurance related designations (CPCU, CIC, CISR, etc.)

### **SUPERVISORY RESPONSIBILITY**

None

### **WORK ENVIRONMENT**

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, cell phones, photocopiers, filing cabinets and fax machines.

### **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 occasionally required to stand; walk; sit; use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms; climb stairs; balance; stoop, kneel, crouch or crawl; talk or hear; and taste or smell. The employee must occasionally lift or move up to 25 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception and the ability to adjust focus.

### **POSITION TYPE/EXPECTED HOURS OF WORK**

Full Time Position – 40-hour work week

### **TRAVEL**

Travel is minimal, although some out-of-area and overnight travel may be expected.

