

# PROPERTY & CASUALTY - COMMERCIAL LINES CLIENT EXECUTIVE

## JOB DESCRIPTION

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Provide both strategic and operational leadership for an established book of P&C clients. Participate in sales presentations with producers, offering professional insight to the services of the Company and technical issues within the P&C industry.

### REPORTS TO

Managing Director – Property & Casualty

### ESSENTIAL FUNCTIONS

- Has ultimate responsibility of informing and educating clients regarding policy coverage, changes, exclusions and other important policy information.
- Works with the Producer and/or Client Manager in contacting clients to obtain updated renewal information in completing application for renewal business within 90-120 of policy expiration.
- Has ultimate responsibility for the overall marketing process (strategy, arranging submission, negotiating, reviewing quote options, and developing appropriate presentation documents).
- Responsible for oral presentation of all items as needed/requested by clients and prospects.
- Manage overall account lifecycle: pre-renewal, renewal, post-renewal, stewardship.
- Ability to recognize additional coverage opportunities within an existing book of business.
- Identify clients' ongoing insurance-related wants and needs in providing solutions through risk management consulting.
- Assist the Producer and Client Manager in placing new business.
- Exhibits proficiency in using the agency management system, 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, etc.
- Participate in special projects and other duties assigned.

### COMPETENCIES

- Ethical Conduct
- Strategic Thinking
- Leadership
- Decision Making
- Communications Proficiency (Verbal and Written)
- Strong Presentation Skills (Verbal and Written)
- Strong Computer Skills

## **SUPERVISORY RESPONSIBILITY**

Moderate supervision of Client Managers for related clients that you are working on together.

## **WORK ENVIRONMENT**

*Flexibility to be remote.*

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 minimum

## **TRAVEL**

Travel is minimal to moderate, occasional out-of-area and overnight travel is common.

## **REQUIRED EDUCATION AND EXPERIENCE**

- Bachelor's degree required
- Active State of Ohio and/or Illinois P&C license required
- Minimum 5+ years of property and casualty experience
- Proficient with Microsoft Office suite of products
- Knowledge of commercial lines coverage

## **PREFERRED EDUCATION AND EXPERIENCE**

- CPCU, CIC, ARM or equivalent designation preferred
- Experience using Applied EPIC agency management system

## **OTHER DUTIES**

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

