

Commercial Lines Account Executive Job Description

Responsibilities

The account executive is expected to contribute to the growth of the commercial lines department by supporting the Commercial Lines Sales & Service efforts through customer service, account retention, general back office support, independent thinking and problem solving.

This includes:

- extensive client phone contact, cross selling, account rounding
- provide professional customer service
- problem solving for the client
- take a "Total Account" approach to selling and customer service
- underwriting/marketing of new and re-written business
- marketing/quoting new business and additional coverages
- coordinate with producers to create an efficient workflow process
- processing of new business policies, renewals and endorsements
- processing of change requests, certificates, summaries of insurance, binders and other service items
- handling daily communications from the company underwriters
- account /renewal reviews on assigned accounts
- keeping abreast of the markets used by JP Inc. and industry trends
- share knowledge and skills with the other members of the C/L's Department and the Office
- carry out projects assigned by the C/L's Manager
- assist in the development of Assistant Account Executives where applicable
- participate in departmental projects, office-wide projects, outings and team building events

Requirements

The Account Executive is expected to have a strong working knowledge of the following:

- commercial insurance coverages and how they apply to a client's needs
- identifying and providing coverage for a client's exposures
- rating commercial coverages
- automation and professional office procedures
- Excellent Communication Skills (Verbal & Written)
- New York State P&C License

Claims

Knowledge of claims and claims handling. Assisting clients in reporting claims and getting claims settled.

Inside Position

This is an 'inside' position however, the account executive is expected to attend client visits as necessary to provide a high level of customer service.

Education/Classes

The account executive is expected to attend various insurance and automation related education classes given by industry trade associations at the discretion of the C/L's Manager. The cost of these classes is covered by John Petschauer Inc. They are typically given at local venues during normal business hours.

- **This Job Description is to be used as a guideline. The responsibilities and requirements are not necessarily limited to the above lists and descriptions.**