JOB TITLE: Client Manager

SUMMARY: Responsible for managing and coordinating all assigned accounts.

DUTIES AND RESPONSIBILITIES:
- Manages assigned accounts; analyzes accounts for adequacy and appropriate coverage. Prepares final proposal presentation, analysis and summaries as needed.
- Reviews endorsements for completion and accuracy.
- Markets the account and reviews marketing placements.
- Initiates and follows up on renewal applications.
- Identifies cross/up selling opportunities. Expands and rounds out existing accounts by identifying potential gaps in coverage, recommending and implementing proper coverage.
- Responsible for making sure that all the terms and conditions of the insurance policies are properly prepared.
- Tracks claims, flags claim-heavy accounts and incorrectly written accounts.
- Responsible for agency billing according to service standard.
- Performs other related duties as assigned by management.

QUALIFICATIONS:
- Bachelor's Degree (BA) from four-year college or university, or 1-2 years of related experience and/or training, or equivalent combination of education/experience.
- State of Maryland Property and Casualty Insurance License required.
- Computer skills required: Epic Online Database software; Microsoft Office Suite

COMPETENCIES:
- Customer Service - Manages challenging customer situations; Responds promptly to customer needs; Solicits feedback to improve service; Meets commitments.
- Oral Communication - Speaks clearly and persuasively; Listens and gets clarification; Responds well to questions; Demonstrates presentation skills.
- Planning/Organizing - Prioritizes and plans work activities; Uses time efficiently; Sets goals and objectives; Develops realistic action plans.
- Professionalism - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect regardless of status or position; Accepts responsibility for own actions; Follows through on commitments.
- Written Communication - Writes clearly and informatively; Edits work; Varies writing style to meet needs; Presents numerical data effectively; Able to read and interpret written information.

PHYSICAL DEMANDS AND WORK ENVIRONMENT:
- Occasionally required to stand/walk; frequently required to sit; continually required to utilize hand and finger dexterity and to talk or hear. Normal office environment.
The above is intended to describe the general content of and requirements for the performance of this job. It is not an exhaustive statement of requirements. Nothing in this job description restricts management’s right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.