

# Personal Lines Account Manager

## Job Title

### Employer Information

<b>Organization Name:</b>	Webber & Grinnell Insurance Agency
<b>Website:</b>	www.webberandgrinnell.com
<b>About Our Organization:</b>	Property & Casualty Independent Insurance Agency
<b>Department:</b>	Webber & Grinnell and Ross, Webber & Grinnell
<b>Division:</b>	Personal Lines
<b>Reports To:</b>	Kathy Cusson / Personal Lines Manager
<b>Job Location:</b>	8 North King St., Northampton, MA 01060 OR 98 Lower Westfield Rd, 3 <sup>rd</sup> Floor Holyoke, MA 01040
<b>Hours/Week:</b>	35
<b>Job Classification:</b>	Full Time
<b>Remote Position Available:</b>	Management Discretion
<b>Starting Salary Range:</b>	\$35,000 - \$55,000 USD/Year – according to experience level
<b>FLSA Status:</b>	Salaried/Exempt

### Job Purpose

This position is responsible for servicing a designated segment of Personal Lines accounts (auto, homeowners, excess lines). Our goal is to provide personalized assistance to all clients. For your group of accounts, you will be required to review and advise on new business, renewals, and endorsements. Account rounding / soliciting other lines of insurance is expected to help with agency growth. Writing new policies for existing clients and, at times, clients new to the agency is required. You will assist customers with claims and billing questions as well. The Personal Lines department stresses the importance of teamwork. You will be expected to assist all Personal Lines clients of the agency, including those outside your designated assigned group. Retention is our primary goal, therefore, we strive to provide exceptional customer service to all our clients with courtesy and professionalism.

## Tasks

- **Customer Service**  
Servicing any Personal Lines client as needed with respect to calls, emails, faxes, mail, office visits.
- **New Business**  
Writing new Personal Lines policies for existing and new clients as needed. This includes quoting, application preparation, completion of RTAs and binders if needed, policy issuance, and posting of down payments.
- **Policy Change Requests**  
Discussing and advising policy change requests with client and set up for processing by the Personal Lines Processor. Account Manager to process as needed.
- **Account Rounding**  
Asking current clients for the opportunity to quote other lines of insurance for them and will complete the new business process if successful.
- **Data Entry/File Maintenance**  
Documenting all activity on account in agency management system. This will include phone and in-person conversations with client, conversations with a company representative, and action taken on a mail item. Will scan and attach all paper and email correspondence to client file. Will also set up new policies, create suspense notes, and create policy change requests. Will renew surplus lines policies which do not download and update policy information.
- **Retention**  
Reviewing renewal policies, making suggestions to clients, and remarketing if necessary to retain the business.
- **Claims**  
Guiding clients with the claims reporting process and being available to assist with client questions throughout the claim which may include calls/emails to company claim reps., or adjusters.
- **Electronic Mailboxes**  
Addressing / responding to mail of team in shared electronic mailbox so as to remain current in workload. Forwarding mail that has been agreed upon to Personal Lines Processors to handle.
- **Teamwork**  
Assisting Personal Lines account managers with clients and workload as needed.

## Work Activities

- Communicating with Manager & Peers
- Cooperating with and assisting the Personal Lines team
- Attending Personal Lines Meetings and Agency meetings as scheduled
- Compiling information
- Making decisions and problem solving
- Maintaining knowledge of current developments in area of expertise
- Establishing and maintaining interpersonal relationships
- Analyzing and evaluating data and information to determine accuracy
- Updating and using relevant knowledge
- Using Computers & Software
- Providing consultation and advice to others
- Working as a collaborative team with other Personal Lines Account Managers
- Owning errors made and being approachable to discuss and learn from them
- Attending Continuing Education classes (2 per year) to maintain P&C License (if licensed) or as requested by department Manager to enhance your product knowledge

## Work Content

### Physical Demands

The employee is regularly sitting. Use hands to finger, handle, or feel; Reach with hands and arms; Talk or hear.

### Lifts Weight or Exerts Force Work Environment

The employee occasionally lifts up to 10 pounds.

### Visions

Specific vision abilities required by this job include Close vision; Distance vision; Peripheral vision; Depth perception; Ability to adjust focus.

## Qualification

### Education and Experience

#### Years of Experience

At least 1 year of Personal Lines insurance experience is preferred but willing to train an inexperienced desirable candidate.

#### Education

High School degree is required. Some college is desirable.

## Skills

### Basic Skills

- **Active Listening**  
Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times. Understanding the implications of new information for both current and future problem-solving and decision-making.
- **Reading Comprehension**  
Understanding written sentences and paragraphs in work related documents.
- **Speaking**  
Talking to others to convey information effectively.
- **Reliable & Trustworthy**  
Being prompt and following through
- **Computer skills**  
Ability to seamlessly navigate websites and utilize Outlook, Word, and Excel
- **Critical Analysis**  
Ability to work independently to access situations and problem solve
- **Organization**  
Ability to organize and prioritize large volumes of work

### Social Skills

- **Social Perceptiveness**

Being aware of others' reactions and understanding why they react as they do.

- **Coordination**  
Adjusting actions in relation to others' actions.
- **Service Orientation**  
Actively looking for ways to help people.
- **Teamwork**  
Being a team player with a great attitude and willingness to assist other team members when needed

### Resource Management Skills

- **Time Management**  
Managing one's own time and the time of others.

### Desktop Computer Skills

- **Databases**  
Using a computer application to manage large amounts of information, including creating and editing simple databases, inputting data, retrieving specific records, and creating reports to communicate the information.
- **Internet**  
Using a computer application to create, manipulate, and edit data.
- **Navigation**  
Using scroll bars, a mouse, and dialog boxes to work within the computer's operating system. Being able to access and switch between applications and files of interest.
- **Spreadsheets**  
Using a computer application to enter, manipulate, and format text and numerical data; insert, delete, and manipulate cells, rows, and columns; and create and save worksheets, charts, and graphs.
- **Word Processing**  
Using a computer application to type text, insert pictures, format, edit, print, save, and retrieve word processing documents

## Knowledge

### Required

- Administration and Management
- English Language
- Customer and Personal Service
- Mathematics
- Team player
- Computer knowledge

## Apply

To apply, please send a resume and cover letter to Kathy Cusson, Personal Lines Department Manager at [kcusson@webberandgrinnell.com](mailto:kcusson@webberandgrinnell.com)