



**Job Title:** Account Manager

**Reports To:** Agency Principal

**FLSA Status:** Non-Exempt

**Summary:** Builds and maintains a profitable growing portfolio by selling insurance products and providing superior client service to members of Masters Insurance Group.

**Essential Duties and Responsibilities:**

- Provides world-class customer service and follow up by communicating with internal/external personnel regarding problem situations.
- Performs 20, pro-active OYS Reviews per month.
- Prepares and presents accurate quotes and recommends coverage based on customer needs.
- Acts as a “Trusted Advisor” with coverage recommendations.
- Cross sells and upsells other product lines.
- Sells or refers 1 life policy per month.
- Participates in agency Client Appreciation Events.
- Makes contact notes to record all client interaction.
  
- Develops relationships with clients in order to promote higher retention.
- Monitors customer preferences and trends and reports useful data back to the sales management.
- Ensures that all applicable licensing and fiduciary requirements are in compliance according to applicable regulations.
- Complies with Incomplete and Held Changes, Premium Changes, OYS and UW Memos.
- Adheres to company compliance and regulations.
- Performs all other duties as assigned.

**Competencies:**

- Critical Thinking - Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Goal Oriented - Maintains specific and measurable performance goals. Effectively overcomes obstacles to sales success. Demonstrates effective presentation skills.
- Customer Service – Exceeds the expectations and requirements of customers, responding promptly to service requests. Handles difficult situations.

- Communication – Communicating effectively in writing as appropriate for the needs of the audience. Talking to others in person and over the phone to convey information timely and effectively.
- Time Management – Uses his/her time effectively and efficiently. Values time. Concentrates his/her efforts on the more important priorities.
- Teamwork - Promotes cooperation and commitment within a team to achieve goals.
- Work Quality – Directly responsible for quality control. Consistently achieves desired outcomes with a minimum of avoidable errors and problems.

**Experience and Requirements:**

- High School Diploma or GED equivalent; Bachelor’s degree preferred.
- P&C and L&H licenses required.
- Prior P&C insurance sales experience preferred.
- Prior commissioned sales experience preferred.
- Proficient in Web and use of internet, spreadsheets, record keeping, routine database activity and word processing software.

**Physical Demands:**

While performing the duties of this job, the employee is regularly required to stand and walk. The employee must regularly lift, push, pull and/or move up to 25 pounds. The employee must be capable of bending, reaching, crouching and climbing.

To perform this job successfully, an individual must be able to perform each essential job duty satisfactorily. The requirements listed above are representative of the knowledge, skill and/or ability and physical demands required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Employee Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**(Printed)**

**Updated 2/17/16**