

Job Title	Personal Lines Account Manager
Location	Mount Vernon, OH or Mount Gilead, OH
Remote Option	Not Available
FT/PT	Full-Time
FLSA Status	Non-Exempt

Job Summary

Under general supervision of the office manager, the incumbent in this position is responsible for maintaining client relationships through the provision of excellent customer service. The position is also accountable for selling additional lines of insurance products to existing clients, as well as general claims processing.

Essential Duties and Responsibilities

- Account Manager Role
 - Engage with and respond to client communication via phone, email and any other communication method the agency employs
 - Work with insurance company personnel and appropriate third parties in the course of serving agency clients
 - Counsel clients on coverage decisions that best meet the client's needs
 - Make policy changes using the tools and methods available to the agency
 - Sell additional lines of business to existing clients
 - Prevent agency team members devoted to new client sales from being involved in service issues, unless absolutely necessary
 - Keep records of activity using the agency's tools and according to agency standards for doing so
 - Perform in an ethical and professional manner at all times
- Claims Processor Role
 - Receive claims calls from clients
 - Assist clients through the claims process
 - Report claims to carrier

Additional Responsibilities

- Fully support the agency's position on the importance of documented procedures and their consistent use by all employees, including ...
 - Utilize and comply with documented procedures, when available
 - Actively seek to improve the efficiency and effectiveness of all tasks performed
 - Communicate and suggest ideas for improving agency processes and procedures, equipment and tools, or any other ideas that would benefit the agency
- Comply with all agency policies
- Maintain regular and punctual attendance
- Participate in team cooperation and development
- Participate in agency meetings
- Perform other duties as assigned by management of the agency

Supervisory Responsibilities

- Directs some of the duties of Service Assistant position
- Provides training and guidance to Service Assistant position
- Offers strong input on performance reviews of Service Assistant position

Required Education and Experience

- High school graduate
- 1 to 2 years of experience in Customer Service (preferably in insurance industry)
- Current license in property/casualty insurance or within 90 days of employment
- Current license in life insurance or within 180 days of employment

Required Knowledge, Skills and Abilities

- Good organizational skills with the ability to manage multiple tasks efficiently
- Ability to work independently
- Ability to learn and adapt to new computer programs and automation skills very quickly
- Ability to keyboard proficiently
- Capacity to professionally perform accurate, efficient and quality work at all times
- Ability to present a positive impression of the agency to all callers and visitors
- Desire to actively seek to improve the efficiency and effectiveness of the position's duties
- Demonstration of serving clients and coworkers in a professional, courteous and polite manner
- Possession of valid driver's license

Expected Hours of Work

- Monday through Friday, 8:30 AM to 5:00 PM, with 1 hour lunch break each day
- Occasional overtime may be required

Travel

- Possibility of the need to drive to client sites to perform home inspections
- Occasional travel to attend training and educational courses

Work Environment

- General internal office environment

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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Lift/carry up to 10 pounds on a frequent basis
- Remain in a stationary position approximately 90% of the time
- Occasionally move about inside the office to access files, office machinery, etc.
- Operate a computer and other office productivity machinery
- Regularly required to use hands and arms to finger, handle controls and reach
- Vision ability includes reading, close vision and adjusting visual focus
- Communicate with callers, visitors and coworkers
- Drive a motor vehicle

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

This job description does not alter in any way the employment-at-will nature of the employee relationship, nor does it constitute a contract of employment between the position incumbent and the agency. Employees can be terminated for any reason not prohibited by law.