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# Example of Personal Account Manager Job Description

Our company is growing rapidly and is looking to fill the role of personal account manager. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for personal account manager

* Check policies/endorsements/audit for accuracy
* Coordinate premium and/or fee collection with Producer and/or accounting and prepare finance agreements
* You will have good PC knowledge, be customer focused and have excellent written and verbal communication skills
* You must also have a solid understanding of Microsoft Office and strong internet skills
* Identify and win new business opportunity through the customer’s organization
* Prepare, implement and execute Strategic Account plans at both Group and Account level and update on a quarterly basis
* Prepare and Present Quarter, half year and annual business plans to the sales management, manage the L/E and Pipeline
* Promote and engage the Sales Specialists for particular solutions
* Manage sales to increase revenue and gross profit for HP products for a Global Account across the Countries at Worldwide level
* Previous experience managing Enterprise Global accounts at Worldwide Level

## Qualifications for personal account manager

* Must hold a current Property & Casualty insurance license or obtain within 6 months
* Advanced professional designation or courses being taken toward a designation (PRMA)
* High School diploma or equivalent required, though college degree preferred
* Massachusetts Property and Casualty License is required and must be obtained within 6 months of starting the position if the license is not already held prior to hire
* Candidates must have 3 - 5 years of customer service experience, preferably in an insurance agency or insurance company environment
* Proven track record in sales or account management in retail or B2B