Example of Commercial Lines Account Manager Job Description

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Our company is growing rapidly and is looking for a commercial lines account manager. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for commercial lines account manager

- Orders and issues binders, certificates, policies, auto id cards, endorsements and other related items
- Determines if direct or agency billing is appropriate and invoices accordingly
- Prepares summaries of insurance, statement of values, and proposals
- Processes renewals in coordination with the Sales Executives according to standardize agency procedures
- Reviews year end audits of policies
- Reviews policy and policy change information, facilitating corrections when necessary
- May provide guidance and direction to other CSAs
- Proactive and strategic anticipation of client needs and timely response to client inquiries and the requests of Producers and Unit Manager
- Acts as liaison between clients and insurance carriers to resolve service issues
- May participate in or conduct client meetings when necessary

Qualifications for commercial lines account manager

- Advanced professional designation preferred on in progress
- Ten years of experience in the insurance industry
- Must have proven experience conducting quality customer service
- Must be able to communicate effectively with clients, producers, carriers and staff

- 3-5 years' experience with commercial property and casualty account management