

Client Manager: Personal Insurance

Position Title: Client Manager
Department: Personal Insurance
Location: Cape Cod & South Shore Massachusetts
Reports To: Branch Manager
Date: May 2015

Job Summary

Provide exceptional service and insurance education to clientele through consultative approach. Focus is on exceeding client expectations. Maintain and communicate comprehensive understanding and awareness of personal lines insurance products and services. Demonstrate a drive to round, cross-sell, up-sell and refer business to, and within, the Agency.

Major Responsibilities

- Provide exceptional service, consultation and insurance education to clientele
- Provide consultative approach to identify and respond to client needs
- Act with honesty and integrity to uphold Rogers & Gray's mission and values, and in all Agency interactions
- Act in compliance with Agency's fiduciary responsibility
- Demonstrate and articulate thorough understanding of insurance products, services and coverage
- Underwrite and evaluate risks to ensure proper coverage is placed
- Act in compliance with all agency required workflows, policies, procedures including all required documentation
- Understand and fully utilize available technologies and equipment to maximize service and efficiency
- Document all client and company activity in agency management system
- Actively round existing house accounts, ask for referrals and develop additional limits and coverage
- Review monthly renewal list and be sure policies are renewed and bound by expiration date
- Review and document expired policy list and return to Office Manager as required
- Perform duties in responsive, timely manner, escalating to manager when necessary
- Assist and direct clients to appropriate resources in claim situations
- Understand individual role in Agency disaster plan, and maintain own current manual
- Other duties as assigned

Job Requirements & Qualifications

- High School degree or GED equivalent, College degree preferred
- MA licensure preferred
- Comprehensive background and experience in all lines of Personal Insurance preferred
- Exceptional customer service skills
- Strong attention to detail and conscientious, thorough approach to work
- Ability to understand how details relate to "big picture" concepts
- Ability to interact professionally and courteously with employees, clients, carriers and vendors etc.
- Strong oral and written communication skills
- Ability to take own initiative and be resourceful
- Excellent ability to multi-task, problem solve, follow-up and adhere to deadlines
- Professional appearance and demeanor
- Calm, Professional conduct and manner
- Exhibits a love of learning and technology
- Travel may be required between Agency locations as needed
- Ability to work additional hours in disaster situation. May include evenings, weekends, Holidays.
- Networking and community involvement encouraged

Summary: *The statements contained in this job description reflect the general details as necessary to describe the principal functions of this job, the level of knowledge and skill typically required, and the scope of responsibility. It should not be considered an all inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absences or relief, to equalize peak work periods or otherwise to balance the workload. This description is not intended as a contract and is subject to change.*