



## Commercial Lines Account Manager Job Description

### PLEASE NOTE:

**THIS POSITION REQUIRES A STATE OF ALABAMA PROPERTY & CASUALTY INSURANCE LICENSE.**

**Office Hours:** 8AM – 4:30PM, Monday - Friday

**Location:** Truitt World HQ

**Salary:** \$42,000 annual salary

**Bonus:** possible at owner's discretion

### Description:

Our ideal candidate is someone who is energetic and can juggle a variety of projects at one time. You take pride in helping others and enjoy being the go-to person for questions and requests, thrive on creating order and not letting little things become bigger issues. We want raving fans for our business and this job is critical to making that happen.

### What We Believe In:

**Be Nice • Help Others • Over-Communicate • Get It Done Quickly**

### Job Responsibilities:

- Build & maintain great relationships with existing clients.
- Solve problems, remove obstacles for others and generate ideas for improvements
- Work with clients as primary day-to-day service contact.
- Work with producers to keep existing clients happy and new clients feel welcome.
- Enter policy changes, policy billing, claims, etc.
- Follow up on outstanding invoices as needed.
- Issue auto ID cards, proof of insurance, insurance certificates, financing agreements, and other documents as needed.
- Quote renewals & new business as appropriate.
- Help collect client information as needed from clients & prospects.
- Conduct renewals as needed for existing clients.
- Develop proposals for new & renewal business as appropriate.
- Cross sell to existing clients as appropriate.
- Scan & attach documents.
- Monitor insurance carrier websites for client activity & updates
- Help other agency staff with endorsements and related activities.
- Answer the phone as needed
- Other functions as assigned by agency management.

**Job Requirements:**

- Be here for your agreed upon work schedule
- Great attitude, easy-to-get along with
- Good communication skills, both verbal & written.
- Ability to multi-task and follow things through to completion
- Amazing follow through and attention to detail (be sure to mention firemarks so we know you actually read this)
- Attend weekly staff meeting and be prepared to discuss any issues impacting you clients & prospects.
- Obtain/maintain appropriate licensing with State of Alabama Insurance Department.
- Become proficient with our agency management system (Partner XE) and other office automation tools.
- Document client interactions & related activities in Partner XE.

**Perks / Benefits**

- **100% Paid Individual Health Care**
- **Paid Long Term Disability Coverage**
- **10 Paid Company Holidays:**
  - New Year's Day
  - Good Friday
  - Memorial Day
  - July 4<sup>th</sup>
  - Labor Day
  - Thanksgiving & Day After Thanksgiving
  - Christmas Eve & Christmas Day
  - New Year's Eve
- **Free Food Fridays**
- **Monthly Employee-Led Charity Donation**
- **Table-Goodies**
- **Birthday Off**
- **The Occasional Free Ticket to Area Events**
- **Not a Big, Corporate Environment**
- **We Support Related Costs for Continuing Education & Professional Development**

**Other:**

- Agency management reserves the right to modify and all responsibilities and requirements as needed.
  - Employment with Truitt Insurance & Bonding is at-will.
  - This job description is not intended to and does not create an offer of employment.
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