



## **JOB DESCRIPTION**

**POSITION TITLE:** Lead Account Manager  
**REPORTS TO:** Director of Operations  
**SALARY:** \$60,000-\$80,000 (subject to experience, education, and designations)

### **PRIMARY OBJECTIVE:**

With little supervision, assists producers and Account Executives as assigned while coordinating and aiding CRS Clients.

### **POSITION QUALIFICATIONS/BEHAVIORS**

- Adherence to CRS Core Values and Code of Ethics
- Have minimum 5 years of agency customer service experience
- Bachelor's Degree preferred or experience in lieu of a degree
- Strong written and verbal communication, a high sense of urgency, and the highest attention to detail
- Must have a Property & Casualty license
- Must be knowledgeable in commercial lines coverages
- Familiar with company guidelines and underwriting rules
- Excellent organizational skills

### **DUTIES & RESPONSIBILITIES:**

Responsible for the highest level of customer service in servicing, supporting and coordinating Client's accounts.

- Maintain client files accurately and consistently; responsible for proper documentation of files and proper communication to all in accordance with company workflows, and procedures
- Maintain a high degree of accuracy in agency management and document management systems. Adhere to Epic workflows
- Responds to Client's inquiries, maintains documentation of communications, existing issues, and issue resolutions
- Respond to client requests for information, documents, and general insurance inquiries
- Handle all aspects of Commercial Lines Property & Casualty Insurance. Occasional outside service visits, to the client, may be required
- Maintain renewal expirations, avoid any lapse in coverage
- Responsible for servicing of book and delegation of tasks to team members
- Orders and/or issues binders, certificates, endorsements, policies and other related items; verify their accuracy and deliver to client with appropriate correspondence
- Responsible for resolving coverage and premium discrepancy issues
- Monitor policy expirations
- Other duties as assigned

01/01/2021

*This Job Description is not a complete statement of all duties and responsibilities comprising this position. Job duties are considered minimum requirements for the position.*