

## **Personal Lines Account Manager**

### **Job Description**

SFD Insurance is looking for a customer-oriented personal lines service agent to manage the servicing needs of our existing clients. This includes working with the policyholders of our homeowners, auto, rec vehicle, umbrella, etc. policy lines.

A personal lines customer service agent, or Account Manager, will act as a liaison, provide product/services information and resolve any emerging problems that our customer accounts might face with accuracy and efficiency. The best Account Manager's are genuinely excited to help customers. They're patient, empathetic, and passionately communicative. Account Manager's can put themselves in their customers' shoes and advocate for them when necessary. Problem-solving comes naturally. They are confident at troubleshooting and investigate if they don't have enough information to resolve customer complaints. The target is to ensure excellent service standards, respond efficiently to customer inquiries and maintain high customer satisfaction.

### **Responsibilities**

Personal Lines Account Managers are primarily responsible for retaining the client's business. To do so the responsibilities are outlined below.

- Ensure that customers make buying decisions armed with the right amount of information on new business, change requests and renewals.
- Identify and assess customers' needs to achieve satisfaction.
- Build sustainable relationships and trust with customer accounts through open and interactive communication.
- Provide accurate, valid and complete information to companies, clients, producers, etc.
- Meet personal/customer service team sales targets and call handling quotes.
- Handle customer complaints, provide appropriate solutions and alternatives within the time limits; follow up to ensure resolution.
- Keep records by documenting all conversations in our agency management system of customer interactions, process customer accounts and file documents.
- Follow communication procedures, guidelines, and policies.
- Take the extra mile to engage customers and maintain strong clientele relationships.
- Sell additional policy lines when the client requires additional coverage.

### **Skills**

- Ability to multi-task, prioritize, and manage time effectively in a fast-paced environment.
- Excellent communication and presentation skills - both verbal and non-verbal.
- Advanced computer and typing skills, as a candidate, will be working extensively with multiple websites and computer programs throughout the workday.
- Proven customer support experience, or experience as a client service agent a plus.
- Ability to read and analyze contract language.
- Strong phone handling skills and active listening.
- Customer orientation and ability to adapt/respond to different types of customers.
- Problem solving, attention to detail, initiative, accountability, and integrity.
- Ability to cope in a fast-paced environment.

Must obtain Personal Lines insurance license within 30 days of hire date.