



## Job Description

**Job Title:** Account Executive  
**Business Line:** Commercial Lines  
**Reports To:** Laurie Olson, Vice President  
**FLSA Status:** Exempt  
**Approved By:** Laurie Olson, Vice President  
**Approved Date:** August 1, 2018

### **OUR MISSION:**

Our mission is to establish long-term, mutually beneficial financial relationships with our clients, team members and community. We will:

- ✓ Recruit, reward and retain a team of market leading professionals
- ✓ Collaborate with clients to analyze and understand their financial challenges and opportunities
- ✓ Develop and provide access to a unique set of financial solutions
- ✓ Directly engage in community social, educational and philanthropic activities

### **SUMMARY:**

This role requires an individual who is professional in thought and behavior and displays the drive, determination, and self-motivation to service a diversified and growing commercial lines client base. The Account Executive will work alongside Producers and other team members to provide client service with the goal of achieving high client satisfaction and retention. The Account Executive provides strong technical insurance coverage lead for clients and internal team members. The Account Executive assists in account retention and new business proposals, as well as cross-sell and upsell revenue development.

### **KEY FUNCTIONS AND RESPONSIBILITIES:**

- ✓ Manages the level of service required for assigned commercial accounts to ensure profitability and a high level of retention
- ✓ Supports and communicates with the Producer and other team members on the accounts to the extent necessary to develop and retain the accounts
- ✓ Works with producer and directs team members in reviewing exposures of clients and prospects, assists in the completion of applications, assists the AM in reviewing insurance company forms, and reviews and presents proposals
- ✓ Complete meeting notes and documents client's file
- ✓ Takes advantage of every available opportunity to develop new accounts and new lines of coverage for existing accounts
- ✓ Completes coverage exposure analysis
- ✓ Works with the producer in managing the collection of premiums on all assigned accounts
- ✓ Manages the dispatch and controls schedule of in-house loss control.
- ✓ Actively participates in the claims process



- ✓ Supports and adheres to agency goals and objectives to place and retain business with our key companies
- ✓ Provides outstanding customer service and teamwork and may assist others in acquiring and perfecting these skills
- ✓ Travels offsite to meet with clients and insurance company underwriters
- ✓ Develops and maintains positive, proactive and productive relationships with appropriate personnel at client firms to assure retention of the accounts
- ✓ Fully functional in navigating EPIC system
- ✓ Participates in training to enhance knowledge and skills
- ✓ Informs supervisor and/or manager of all matters that may affect the performance of assigned tasks and/or overall operations of the department
- ✓ Performs other duties as requested

### **QUALIFICATIONS**

- ✓ Bachelor's degree preferred, or equivalent work-related experience
- ✓ Requires a minimum of 9 years independent insurance agency background required or similar years other related work experience (i.e. Risk management experience)
- ✓ Must have achieved or working towards industry designation (e.g. CIC, CPCU, AAI, etc.)
- ✓ Colorado Property & Casualty License
- ✓ Current Colorado driver's license
- ✓ Integrity, professionalism, and positive work attitude
- ✓ Superior knowledge of Commercial Lines products, markets, and the marketing process
- ✓ Ability to satisfy the needs of the customer in a proactive fashion, both internal and external
- ✓ Strong negotiating, decision-making, and sales skills
- ✓ Superior customer service and teamwork skills
- ✓ Ability to understand complex insurance situations, needs and options, and communicate these verbally and in writing in a clear, concise manner
- ✓ High energy, excellent organizational skills, and detail-oriented self-starter
- ✓ Strong leadership, mentoring, and team-building skills
- ✓ High degree of multi-tasking and time management capabilities
- ✓ Ability to learn and perform new duties and responsibilities
- ✓ Ability to travel offsite as needed
- ✓ Strong computer skills with tools such as Outlook, Excel, Word and EPIC

*Note: This job description is not intended to be an exhaustive list of all duties, responsibilities or qualifications associated with this job. The employee is expected to perform those duties listed as well as other related duties directed by management.*

