

COMMERCIAL LINES ACCOUNT MANAGER

JONES DESLAURIERS
INSURANCE MANAGEMENT INC.



MISSISSAUGA, ON | REPORTING TO: Director, Commercial Insurance

POSITION OVERVIEW:

Jones DesLauriers is hiring for an experienced Commercial Account Manager who is a knowledgeable expert advisor in commercial insurance lines of business. The successful candidate will be responsible for managing a book of business, servicing clients in a courteous and professional manner, and assisting the producer in obtaining, maintaining, and expanding business.

RESPONSIBILITIES:

- Responsible for managing a renewal book of business
- Works closely with Producers and other JDIMI staff on all aspects of client service, marketing, and renewal while adhering to JDIMI's best practices and standard procedures.
- Initiate Account Planning with Producer 100 days in advance of the renewal
- Maintain a retention rate of 95% or higher on your Book of Business
- Set clear expectation for client and business partners by providing same day response time
- In collaboration with Producers; coordinate, support plans, discuss arising issues and create comprehensive plans for existing clients
- Develops new business from existing accounts and assigned leads, and contributes to meeting departmental production goals. Identifies and follows-up on cross-selling opportunities when appropriate
- Responsible for the preparation of proposals for prospect and stewardship reviews for existing clients
- Manage account documentation (i.e., routine inquiries, quotes, binders, statement of values, insurance contracts, endorsements, cancellations, etc.)
- Review client's current coverage and exposures, loss experience and analyze risk to determine the product/service requirements
- Maintain up-to-date EPIC workflow documentation and ensures workflows are followed
- Ensure accurate and timely servicing and billing of accounts
- Participate actively in cross-sell campaigns and other initiatives as required
- Actively develop an increased knowledge of related insurance products and client needs
- May participate in or conduct client meetings when necessary
- Participate in training and professional development courses to enhance skills and industry knowledge
- Maintain positive working relationships with clients, staff, other JDIMI departments and offices
- Other duties as assigned

REQUIREMENTS:

- Minimum 5 years of commercial insurance experience required
- R.I.B.O. license required
- C.I.P. or C.A.I.B. designation(s) preferred
- Client development/relationship management experience
- Solid understanding of policy wordings/coverages
- Ability to mentor others and proven negotiation skills
- Strong attention to detail, time management, problem solving and analytical skills
- Ability to be a self starter with strong written and oral communication skills as well as organizational skills
- Advanced skills in Outlook, Excel, Word and EPIC

*We are committed to providing accommodation upon request for applicants and employees with disabilities.
If you require accommodation, we will work with you to meet your needs.*