



ACCOUNT EXECUTIVE/ SENIOR ACCOUNT EXECUTIVE

JOB DESCRIPTION

Position Description

This is a sales (approx. 60%) and service (approx. 40%) position. The primary function of this position is to provide the highest quality service to customers, sell new lines of coverage, and cross sell within the existing book of business. The Account Executive (AE) or Senior Account Executive (SAE) will be the day-to-day liaison between the insurance company (MIB) and designated accounts. The AE/SAE will manage and control the relationships with his/her clients (business managers and/or individual customers).

Daily servicing of customers will include addressing various coverage issues, contract analysis, exposure analysis, handle and/or direct all the inside service work associated with the clients' accounts, including all endorsement activity, routine coverage questions, problem solving, renewal control, preparation of formal proposals, checking and binding policies.

The AE and SAE are responsible for overseeing all processes related to renewals, account management and new business development as well as insuring Standard Operating Guidelines (SOG's) are used and followed for all insurance transactions.

Location: Van Nuys, California

Position Requirements

- Build and maintain constructive and effective relationships with clients by meeting and exceeding client expectations at all times.
- Provide consistent, accurate, timely and pertinent communication to clients through via emails, phone contact and meetings.
- Respond to client inquiries/issues within a 24 hour timeline.
- Resolve/assist with any service or claims issues/questions.
- Assist in design of or independently design insurance plans for clients.
- Think about out-of-the-box solutions.
- Assist clients in making appropriate coverage changes; make each contact a marketing opportunity.
- Conduct face-to-face meetings with the clients to review summary reports, make presentations, and to maintain client relationships as often as necessary.
- Inform and educate clients about coverage, exclusions and exposures; gaps in coverage, stewardship programs; and other relevant information.
- Monitor and review client satisfaction at least quarterly; report findings/issues to Producer of the account.
- Seek referrals from client base and follow through to get new accounts.
- Cross sell and/or refer new business leads to appropriate departments.

- Know and be up to date on the utilization of carrier websites, carrier communications, new coverage options, and billing procedures.
- Quote new business and renewal options to every client.
- Review and check policies based on SOG checklists to include proposals, applications, letters, invoicing, summaries of insurance, certificates, evidence of insurance, binders, etc.
- Full responsibility for managing Accounts Receivables.
- Maintain agency EPIC files accurately and consistently documenting conversations in emails and other notes sent to clients, while adhering to all MIB electronic and EPIC procedures.

Preferred Skills and Abilities

- Any college course work in mathematics, communications, risk management, business administration or other analytical coursework.
- Interpersonal and problem solving abilities.
- Organizational and time management skills.
- Agency Management System (i.e., EPIC, AMS 360) or other paperless computer system.

Physical Actions

Required job duties are essentially sedentary work consisting of occasional walking, standing and lifting and/or carrying 10 lbs. maximum, bending, talking, and hearing.

Physical Environment

Required job duties are normally performed in a climate controlled office environment.

Education Requirements

- High School Diploma, College Degree Preferred.
- Professional Insurance Certification obtained or presently enrolled towards obtaining.

Experience Requirements

- 5 or more years experience on client management.
- Mastery of insurance underwriting, coverage, and rate analysis.
- In-depth knowledge of insurance coverage and an ability to communicate this clearly to clients.
- Must understand marketplace trends and best practices to meet clients' needs.
- Agency or Brokerage experience.
- Strong negotiating skills and ability to close a sale.
- Knowledge of carrier websites to market and rate new and/or renewal business.
- Must have experience with MS Office Suite (Word, Excel, Outlook).

Special Skills Requirements

- Strong written and verbal communication skills.
- Strong follow up skills
- Results oriented
- Fosters a customer service orientation.
- Consistent exercise of good judgment; high integrity.
- Prioritize and complete multiple tasks simultaneously.
- Ability to routinely work under pressure, meets deadlines.
- Work independently and in harmony with a team.

Momentous Insurance Brokerage provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expressions, or any other characteristics protected by the law.