

Client Manager

Department Small Business Division (SBD) **Status:** Non-Exempt
: & Program Group
Reports to: Director, Operations **Revision** 2/07
Date:

Summary:

Under minimal supervision, this position provides technical advice and customer service to existing clients, and develops new accounts in accordance Barney & Barney growth initiatives. In addition, Client Manager regularly interacts with outside vendors, clients usually via the telephone, and in person with associates at all levels of the company.

Essential Duties and Responsibilities:

- Responsible for growth of new and renewal business.
 - Seek new business and account rounding opportunities to meet agreed upon book goals and department cross selling goals.
 - Coordinate coverage placement after conducting thorough marketing search and providing proposals with recommendations based on findings.
- Coordinate and execute client servicing within the scope of the services available in the department.
 - Develop strong relationships with clients' management team to identify current and future needs and risks, and develop a renewal strategy for the upcoming policy year.
 - Provide direction and instruction to administrative associates to ensure policy contracts, legal and other documents, and correspondence are accurate, properly issued, and in accordance with company procedure.
 - Oversee administrative associates' preparation of renewal underwriting information as well as the servicing of client continued insurance needs.
 - Review and deliver policy contracts.
 - Monitor accounts receivables, working with accounting on outstanding amounts due.
 - Maintain accurate data within agency management systems.

Education and/or Experience:

This position requires an individual with a strong sense of urgency and need to win, skilled in relationship building and persuasion, comfortable working at a varying pace, managing multiple tasks and deadlines simultaneously, and adjusting priorities often. In addition, the following is required.

- A valid unrestricted California Fire & Casualty Solicitor's license OR Life & Disability license (Dependent on Position) and satisfaction of ongoing continuing education requirements.
- A valid driver's license.
- Successful work history to include 3 - 5 years experience in a professional office setting directly related to job responsibilities specified above, with progressively greater responsibility for making policy management decisions and judgments.
- Ability to assess contract compliance and product/service quality.
- Ability to utilize multiple carrier websites including quoting modules.
- Proficient in the use of Windows and MSOffice applications (Word, Excel, Outlook).
- Skill in organizing resources and establishing priorities.
- Ability to develop, plan, and implement short- and long-range goals.

Work Environment and Physical Demands:

- Work is performed in a typical office environment using standard office equipment (i.e., computer, telephone, and copier).
- Limited physical effort required.
- Driving to/from client site occasionally required.