

JOB DESCRIPTION

Commercial Lines/Farm Account Manager

DATE: May 2026

REPORTS TO: Commercial Lines/Farm Manager

FLSA CLASSIFICATION: Exempt

DEPARTMENT: Commercial Lines

SUMMARY

Responsible for making a positive and professional impression on people who call and/or visit our agency, focusing on friendly, efficient and prompt service. Marketing and placement of Commercial Lines new business and renewal accounts. Provide comprehensive service to our Commercial Lines Clients by obtaining, maintaining, expanding and servicing accounts. Maintain excellent relationships with customers, producers and companies.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Support Producers' sales efforts by developing complete submissions on new and renewal business and obtain quotes in conjunction with agency marketing procedures.
- Perform annual review and risk exposure analysis of renewal policies for proper coverage, incorporating information obtained from client and/or Producer.
- Maintain agency management system client files and ensure proper documentation, by processing all policies, endorsement changes, invoices, binders, certificates of insurance, documentation, activities, etc., according to agency procedures, and within agency timelines.
- Maintain control of renewal expiration lists, binders, audits, and aged receivables in accordance with agency guidelines.
- Respond to client calls, inquiries, e-mails, mail, and company requests in accordance with agency guidelines.
- Process claim acknowledgements; update activity and claim detail in EPIC, attach acknowledgement and follow up with insured.
- Review all items to be processed, to insure items were received as ordered.
- Prepare billing following agency's credit and collections policies.
- Process daily mail.
- Participate in courses for insurance skills and CE credits.
- Maintain current knowledge of underwriting requirements of carriers.
- Keep current with industry trends by reading appropriate journals and company bulletins.
- Participate in any special projects at management's request.
- Consistent attendance is required at the workplace to successfully perform essential job requirements.

JOB DESCRIPTION

Commercial Lines/Farm Account Manager

COMPETENCIES

- Commercial Lines Insurance Capacity
- Time Management
- Problem Solving/Analysis
- Communication Proficiency
- Ethical Conduct
- Teamwork Orientation

WORK ENVIRONMENT

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopier, filing cabinets and fax machines.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand; walk; use hands to finger, handle or feel; and reach with hands and arms.

POSITION TYPE/EXPECTED HOURS OF WORK

This is a full-time position. Days and hours of work are Monday through Friday, 8:00am to 5:00pm.

EDUCATION AND EXPERIENCE

- Appropriate State license(s).
- Minimum 3 years' insurance brokerage or equivalent experience.
- Completion of CISR or currently enrolled in ARM, AU, or CPCU program.
- Two-year associate college degree required; four-year college degree preferred.
- Extensive knowledge of all lines of commercial insurance, including sophisticated and less common coverages, especially those products represented through agency.
- Thorough knowledge of brokerage operations including claims handling, procedures, commercial lines rating, agency management system, and applicable insurance laws/codes.
- Familiarity with risk assessment and risk management techniques.
- Excellent time management, organizational and verbal and written communication skills.
- High degree of self-motivation and self-direction.

JOB DESCRIPTION
Commercial Lines/Farm Account Manager

OTHER DUTIES

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

SIGNATURES

This job description has been approved by all levels of management:

Manager_____

HR_____

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee_____ Date_____