



THE INSURANCE EXCHANGE

**POSITION TITLE: ACCOUNT EXECUTIVE - COMMERCIAL**

**Location: Rockville, MD**

**Reports to: Department Manager - Sales**

**Status: Full-Time Exempt**

**SUMMARY**

Commercial lines sales oriented position requiring advanced communication skills and a thorough knowledge of commercial insurance products available through the agency. Must be capable of pursuing and closing new and existing accounts and retaining book of business.

**POSITION FUNCTIONS**

1. Achieve objectives established in annual producer sales plan.
2. Prospect for new business from existing clients and identified target groups.
3. Contact prospects for the purpose of providing a quote and making sales appointments.
4. Survey prospects to determine insurance needs, inspecting current insurance policies, risk management plans, property, products and records.
5. Collect detailed risk and underwriting information including loss history, in order to provide insurance quotes.
6. Develop and deliver formal proposals of insurance including details of coverages, limits, deductibles and other pertinent information.
7. Work with service person to complete company submissions and selection of potential markets.
8. Conduct client and prospect appointments communicating proposals and renewals, explaining details and communicating desire to conduct business.
9. Introduce service person to clients and request that service calls be directed to them and forward all service related calls to assigned service person.
10. Stay informed of all claims or service issues and become involved in resolution when required.
11. Participate in renewals, when appropriate, by reviewing expiration listing with service person to determine appropriate action and collection of information to prepare renewal submissions.
12. Maintain production reports and attend all sales meetings as required.
13. Promote agency and insurance industry in the community.
14. Keep informed of industry developments through review of trade press and by attending insurance carrier training meetings on new products, etc.
15. Attend and complete any training sessions or assignments as required.
16. Present a professional image as a representative of the company.
17. Establish and maintain effective professional working relationships with co-workers, and every level of management.

18. Communicate with co-workers, management, clients, and others in a courteous and professional manner.
19. Conform with and abide by all regulations, policies, work procedures, and instructions.
20. Perform other duties as required or assigned by management.

### **QUALIFICATIONS, KNOWLEDGE, SKILLS, AND ABILITIES**

- Proven ability to pursue and close sales.
- Possess exceptional communications skills necessary to communicate with clients, companies, and prospects concerning commercial lines of coverage.
- Ability to exercise strong judgment in analyzing, appraising, evaluating and solving problems of a difficult procedural, organizational, administrative or technical nature.
- All licenses as required by the State Department of Insurance to discuss and/or sell insurance in states where the agency functions.
- Previous experience in sales a plus; college degree is preferred.
- Ability to use personal computer, calculator, agency automation system, and various software programs, including but not limited to Microsoft Word, Excel, and Outlook.

### **WORKING CONDITIONS**

High pressured, fast-paced environment with significant telephone and personal disruption. Large number of multiple steps in complex system performed with accuracy and speed is essential to the successful completion of tasks.

### **GENERAL**

1. This job description is intended to describe the level of work required of the person performing the job.
2. Essential functions are outlined; other duties may be assigned as needs arise or as required to support the agency's essential functions.
3. The description is not intended as a contract and is subject to unilateral change and revision by management.
4. Any written contractual agreements will supersede this job description.
5. All requirements may be modified to reasonably accommodate disabled employees.

**MY Signature below confirms that I have read, understand, and agree to abide by the job description FOR THIS POSITION.**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

Contact Information:

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