



**Job Description:** Account Manager  
**Department:** Individual Lines and Medicare  
**Reports to:** Agency Administrator  
**FLSA Status:** Non-Exempt  
**Hours:** Full-time / 40 hours  
**Location:** Port Townsend Office

### **Position Summary**

The Account Manager provides excellent customer service and administrative support to KMi leadership, staff and clients. This position is integral to supporting, responding, processing and monitoring all aspects of our client's insurance information needs, application processes, and maintaining client files. In addition to maintaining our vision by adhering to our values and guiding principles, this position must provide the highest level of service to our clients and demonstrate a client-centric attitude and foster the agency culture.

### **Essential Functions**

#### *Agency Support*

- Skillfully execute a broad range of administrative and clerical duties to support all agency producers for all lines of coverage
- Answer the phone, screen and forward incoming calls or e-mail inquiries to specific producer as necessary
- Review, evaluate and categorize incoming documents by verifying information for accuracy and completeness
- Competently prepare documents, policy information and files for additional handling or distribution
- Develop systems and forms as necessary
- Schedule client appointments and inform clients of all required documentation
- Organize and prioritize large volumes of information, emails and calls
- Maintain records and client files in accordance with Agency Knowledge Base (KB) to make sure Agency standards are accurate and consistent

- Assist with authoring Agency Knowledge Base (KB) to ensure consistent high-quality standards are met as it relates to individual and Medicare lines of business

#### *Customer Service*

- Provide a professional level of customer service to clients, insurance providers and other agency partners, responding effectively and promptly to all inquiries
- Provide on-going customer service and support clients by answering questions regarding benefits, claims and payments; evaluate needs of clients and plan follow up meetings as appropriate
- Process outgoing insurance applications, ensuring completeness, within 24 hours of receiving in agency
- Monitor insurance applications daily and throughout the underwriting process to ensure a smooth application process
- Develop a strong working relationship with insurance carriers; learn and understand specific underwriting guidelines to fit client needs for all lines of coverage offered in agency
- Cross-sell agency policy offerings and refer to appropriate Producer
- Grow in industry and position knowledge by participating in educational opportunities and obtaining certifications/ licenses

#### *Other Duties*

- Attend, participate and be present in staff meetings
- Step in for other employees as needed
- Participate in agency marketing decisions as directed
- Other duties as assigned

#### **Essential Competencies**

- Professional appearance and friendly, approachable demeanor
- Above average communication skills both verbally and in writing
- Excellent people skills; demonstrate courteous attitude in all interpersonal interactions
- Self-motivated, flexible and able to function effectively in a fast-paced, data and deadline-driven environment
- Effective organizational skills in time-management and with electronic records
- Ability to build a strong rapport with vendors, colleagues and clients

- Exercise critical thinking, problem solving, sound judgment, resourcefulness and proactivity
- Perform duties with precision and accuracy
- Always exhibit tactful and direct communication
- Work independently and as a member of the team
- Always maintain strict confidentiality, both in and out of the workplace
- Advanced technical aptitude with computers, software applications, MS Office suite, in particular Excel, Word, Outlook, PowerPoint, Zoom, Teams, Constant Contact and VOIP systems

### **Qualifications**

- High school diploma or equivalent required
- Demonstrated experience of providing effective support to clients in a similarly complex industry
- Possess current life and disability license or ability to obtain within first three months of employment
- Current AHIP certification must be obtained within first three months of employment
- Washington Health Benefit Exchange (WAHBE) certification to be completed at next available opportunity after life and disability license is obtained
- Able to work outside normal business hours during 4<sup>th</sup> quarter and on occasion to meet business deadlines

### **EEO Statement**

Kristin Manwaring Insurance is an equal opportunity employer without discrimination because of age, sex, color, national origin, marital status, veteran status, sexual orientation or presence of a disability. Pursuant to the Americans with Disabilities Act, Kristin Manwaring Insurance will make reasonable accommodation of working conditions or methods in order to perform the duties of the position.

As standard protocol, KMi will request background information about finalists from a background check provider in connection with your employment or application for employment. With your permission, this information will be obtained in the form of a background report. KMi obtains a criminal and/or credit background report where such information is substantially related to the duties and responsibilities we are hiring for.

**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**

I have read, understand and am able to perform the essential job functions with or without accommodation.

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Employee Signature

Date

## Account Manager

### PHYSICAL REQUIREMENTS AND POTENTIAL HAZARDS

The following identifies the physical demands and potential hazards typically encountered by this position. The information is necessary in part to ensure compliance with the Americans with Disabilities Act and the OSHA Blood borne Pathogens Standards. These can reasonably be anticipated in the normal and customary performance of the essential functions of your work.

**NA:** Not applicable, not required of this position.

**NE:** Requirement is present but is not essential to the position.

**O:** Occasional, up to 33 percent of the time and essential to the position. (For example, a lifeguard swims only occasionally, but it is essential that a lifeguard be able to swim.)

**F:** Frequent, 34-66 percent of the time.

**C:** Continuous, over 66 percent of the time.

	NA	NE	O	F	C
Sitting					X
Walking			X		
Standing			X		
Running		X			
Bending or twisting			X		
Squatting or kneeling			X		
Reaching above shoulder level		X			
Climbing (e.g. ladders)		X			
Driving cars, light duty trucks			X		
Driving heavy duty vehicles	X				
Repetitive motion of hands/fingers					X
Grasping with hand, gripping					X

	NA	NE	O	F	C
Lifting/carrying 10-25 pounds			X		
Lifting/carrying 26-50 pounds			X		
Lifting/carrying more than 50 pounds		X			
Pushing/Pulling		X			
Using Foot Controls		X			
Work in/exposure to inclement weather	X				
Work in/exposure to cold water	X				
Exposure to dust, chemicals or fumes	X				
Work/live in remote field sites	X				
Use of hazardous equipment (e.g. guns, chainsaws, explosives)	X				
Swimming, scuba diving	X				
Work at heights (e.g. towers, poles)	X				
Exposure to infection, germs or contagious diseases	X				
Exposure to blood, body fluid, or potentially contaminated materials	X				
Exposure to needles or sharp implements	X				
Use of hot equipment (e.g., ovens)		X			
Exposure to electrical current		X			
Seeing objects at a distance		X			
Seeing objects peripherally		X			
Seeing close work (e.g., typed print)					X
Distinguishing colors		X			
Hearing conversations or sounds					X

	NA	NE	O	F	C
Hearing via radio or telephone					X
Communicating through speech					X
Communicating by writing/reading					X
Distinguishing odors by smell	X				
Distinguishing tastes	X				
Exposure to wild/dangerous animals	X				
Exposure to insect bites or stings	X				
Work/travel in boat/small aircraft	X				
Exposure to aggressive/angry people			X		
Restraining/grappling with people	X				
Other: High volume of client contact					X
Other:					

**Items checked above must be consistent with tasks listed.**

I have read and understand the physical requirements and potential hazards of this position and am able to perform the physical requirements as stated above with or without reasonable accommodation.

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Employee Signature

Date