



Job Description: Account Manager

Department: All Agency Lines

Reports to: Agency Administrator

FLSA Status: Non-Exempt

Hours: Full-time / 40 hours

Location: Port Townsend Office

Position Summary

The Account Manager (AM) serves as the backbone of our client-focused service, navigating everything from crucial administrative duties and data management to client support and application processing. The AM works closely with our team of insurance brokers, ensuring our clients receive the consistent, superior experience KMi is known for.

The Account Manager provides excellent customer service and administrative support to KMi leadership, staff and clients. This position supports, responds, processes and monitors all aspects of our client's insurance information needs, application processes, and maintains client files. In addition to maintaining our vision by adhering to our values and guiding principles, this position provides the highest level of service to our clients and demonstrates a client-centric attitude and fosters agency culture.

Essential Functions

Agency Support

- Support agency producers for all lines of coverage through execution of a broad range of administrative and clerical duties
- Answer the phone, screen and forward incoming calls or email inquiries to specific producers as necessary, prioritizing customer service
- Review, evaluate, and categorize incoming documents by verifying information for accuracy and completeness
- Prepare professional documents, policy information, and files for client and company use
- Assist in the development of insurance quotes and benefit comparison documents for Medical/Dental/Vision/Life/Disability for potential and existing clients as directed
- Schedule client appointments and guide clients through preparation of required documentation
- Maintain records and client files in accordance with Agency Knowledge Base (KB) to make sure Agency standards are maintained

- Assist with authoring Agency Knowledge Base (KB) materials to propel high-quality standards in all lines of business

Customer Service

- Provide professional customer service to clients, agency partners and team members, responding effectively and promptly to all inquiries
- Provide ongoing client service to owners/administrators of designated employer groups regarding benefits, claims, renewals, forms, and payments. Collect renewal information, participate in renewal strategy meetings, respond to inquiries and support individual, Medicare, Life, LTC and DI sales.
- Process outgoing insurance applications in a timely manner consistent with company expectations
- 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 the appropriate team member
- Grow in industry and position knowledge by participating in educational opportunities and obtaining certifications/licenses, supported by KMi through time and financial investment

Other Duties

- Attend, participate and be present in staff meetings
- Prioritize a team-centric mentality; step in for other employees as needed
- Participate in agency marketing decisions as directed
- Other duties as assigned

Essential Competencies & Desired Qualifications

- Carry a friendly, approachable, and professional demeanor with excellent communication skills.
- Ability to build strong, trusting relationships with clients and colleagues.
- Exceptional organizational skills, time management, and meticulous attention to detail with the ability to organize and prioritize large volumes of information, emails, and calls.
- Maintain a self-motivated and flexible approach to effectively prioritize tasks and thrive in a deadline-driven environment.
- Demonstrated experience of providing effective support to clients in a complex field.
- Comfort with technology and proficiency in common software applications (MS Office suite, Zoom, Teams, etc.).
- Ability to obtain a life and disability license within the first three months of employment. KMi will fully reimburse certification training and exam expenses upon successful completion and will support study during paid work hours. There is also an opportunity to complete Washington Health Benefit Exchange (WAHBE) certification after life and disability license is obtained.
- A high school diploma or equivalent.
- The ability to maintain strict confidentiality.
- Flexibility to work outside normal business hours during our busy 4th quarter (with overtime compensation) when needed.

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.