



GRAYBEAL

GROUP, INC.

Position: P&C Insurance Account Manager

Division/Department: Commercial Lines

Working Hours: M-F, 8 AM to 5 PM

Holidays: US Holidays (Offices are closed)

Employment Type: Full-time (40 hrs a week)

Starting Salary: Salary Dependent upon Experience

Benefits:

- Health Insurance
- Dental Insurance
- 401K 4% Match
- Profit Pool Opportunities

About the Company:

Graybeal Group Inc. is a professional Insurance company with Licensed Agents and Staff. Our agents specialize in our clients' needs in Carbon, Crop, Agriculture, Non-Profits, Pasture Rangeland and Forage, Farm, Ranch, Auto, Home, and Life Insurance.

What we are looking for:

Responsible for completing new and renewal applications and assists in producing new accounts and retaining existing accounts. Provides exemplary customer service to our clients and producers by providing prompt, detailed, and accurate service.

Responsibilities:

- Gather and organize all information for applications and risk management for new business applications.
- Gather and organize all information and risk management recommendations for renewal of designated accounts 90 days prior to renewal.
- Process and provide to the producer all renewals with prior year comparisons, recommendations, and changes 30 days prior to renewal.
- Provide customer service to designated accounts and writing agent including, but not limited to binders, certificates, bonds, endorsements, and quotes.
- Manages day-to-day customer service interactions.
- Re-quotes and markets accounts.
- Negotiates with carriers and prepares presentation/proposal materials.
- Notifies the producer of any cancellations within 24 hours.
- Collect Agency Bill premiums and forward to Accounting.
- Keep accurate, up-to-date records in Salesforce.

- Documents all material conversations with clients, carriers, and staff in Salesforce through Cases.
- Works with assigned VA's to delegate appropriate tasks.
- Maintains an efficient work process with timeliness, accuracy, and completeness.
- Maintains confidentiality and professionalism at all times.
- Performs other functions as determined and assigned by management.

Knowledge, Skills & Qualifications:

- Must have and maintain all licenses required by the State Department of Insurance to discuss and/or sell insurance in states where the agency functions.
- Should be working toward a CPCU designation or will consider designation alternatives.
- Requires both verbal and written communication skills.
- Requires satisfactory working knowledge of Salesforce and Office 365.
- Requires satisfactory typing and computer skills.

Working Conditions:

- Requires the ability to work in a fast-paced multi-tasking environment.
- Requires a positive, team-building attitude that works well with others.
- Requires the ability to follow our EOS and GWC business model.

Core Values

What are “Core Values”?

Core values are the fundamental beliefs of a person or organization. These guiding principles dictate behavior.

Do the Right Thing

- Morally & ethically.
- Best Interest of our customers, team, carriers, and community.

Teamwork

- Support each other. TEAM mentality.

Positivity

- In and out of the office.
- With customers, carriers, vendors and teammates(everyone).
- In our win thinking. Negativity is a cancer.

Go the Extra Mile

- Always be willing to do MORE.

Always Be Learning

- Conceptual Knowledge (Insurance Education).
- Development of a training calendar.
- Personal Development (reading, seminars, etc.).
- About our customers and their needs, better able to HELP them.
- Hobbies and new skills.

Play to WIN

- Be the best.
- Committed to Growth.
- Make more money!