

## Account Manager – Commercial Lines

### ROLE OVERVIEW

Commercial Lines Account Managers are responsible for delivering high-quality client service, managing retention, and supporting the growth of an assigned book of commercial business. This role serves as the primary point of contact for clients and works closely with producers, carriers, and internal teams to ensure client needs are met with professionalism, accuracy, and proactive communication.

Commercial Lines Account Managers are expected to take ownership of their accounts, anticipate client needs, and provide thoughtful, consultative support. CAI's culture is grounded in Clarity, Accountability, Resilience, Engagement, and Strategy, and Account Managers are expected to reflect these attributes in how they manage client relationships, collaborate with teammates, and approach their work.

### CORE RESPONSIBILITIES

- Develop and maintain strong, trust-based relationships with clients, carrier partners, and internal team members.
- Educate and advise clients on coverage options and recommendations tailored to their unique risks, ensuring clarity and confidence in decision-making.
- Proactively conduct account reviews to assess coverage adequacy and identify potential gaps or changes in risk.
- Manage new and renewal business marketing processes from start to finish, demonstrating ownership and attention to detail.
- Evaluate and negotiate carrier quotes on behalf of clients to align coverage, value, and risk considerations.
- Support growth of the existing book of business through thoughtful account rounding and proactive coverage discussions.
- Prepare clear, accurate proposals and presentation materials that support informed client decisions.
- Bind coverage accurately within established authority levels and agency guidelines.
- Resolve policy, billing, and coverage-related concerns with professionalism, responsiveness, and accountability.
- Maintain a strong working knowledge of carrier underwriting guidelines, appetite, and product offerings.

- Ensure client files are complete, accurate, and well-documented in accordance with agency standards.
- Contribute to the overall success of the team by sharing knowledge, supporting colleagues, and taking on additional responsibilities or special projects as needed.

### **SKILLS & QUALIFICATIONS**

- Client-focused with a strong sense of accountability for service quality and retention.
- Proven ability to manage a book of business independently and prioritize competing deadlines.
- Strong problem-solving skills with a solutions-oriented mindset.
- Clear, professional communicator with strong written and verbal skills.
- Organized, detail-oriented, and consistent in follow-through.
- Adaptable and calm when navigating complex client situations.

### **REQUIREMENTS**

- Active insurance license or ability to obtain within 90 days.
- Progress toward or interest in advanced industry designations preferred.

### **CAI CULTURE & EXPECTATIONS**

At CAI, how we show up matters. Commercial Lines Account Managers are expected to act with integrity, accountability, and professionalism while delivering a high-quality client experience. This role requires a collaborative mindset, respect for others, openness to feedback, and a commitment to providing clarity and confidence to clients, producers, and colleagues.