



COMMERCIAL INSURANCE ACCOUNT MANAGER

BIS is an independently owned benefit and commercial insurance broker located in Roswell, GA. Our mission is to serve others through responsive insurance advising. We aim to excel in our industry while maintaining our commitment to service, integrity, faith, and excellence. We have an unwavering commitment to both our employees and our clients. This has earned us the prestigious title of one of the Best Places to Work by The Atlanta Business Chronicles for multiple years.

Account Manager is responsible for managing commercial property and casualty accounts with a strong emphasis on risk analysis, policy servicing, and strategic marketing. This role supports the full policy lifecycle, from quoting and placement to renewals and carrier negotiations, ensuring clients receive tailored, competitive insurance solutions. The position also involves leveraging CRM systems to manage client relationships, track policy activity, and support marketing and sales efforts efficiently.

KEY RESPONSIBILITIES

Account Management & Risk Services

- Analyze client risk profiles using financials, loss history, and industry data to support underwriting and placement decisions.
- Review and process policy endorsements, audits, and renewals to ensure accuracy and compliance.
- Issue certificates of insurance and review contracts for insurance requirements.
- Maintain organized documentation in agency systems (e.g., Applied, CSR-24).
- Deliver bound policies and renewal documents to clients in a timely manner.
- Ensure accurate invoicing, billing reconciliation, and commission tracking in agency systems.
- Utilize CRM and agency management platforms to manage workflows, track tasks, and document client interactions.
- Continuously improve internal processes to enhance efficiency and service quality.
- Respond to client service requests promptly and professionally.

Marketing & Relations

- Manage a portfolio of commercial P&C accounts, ensuring timely and accurate servicing of policies.
- Coordinate with underwriters and carriers to negotiate terms, pricing, and coverage enhancements.
- Develop and execute marketing strategies for new and renewal business, including preparing submission packets and marketing to multiple carriers.
- Maintain strong relationships with carrier partners to stay informed on appetite, products, and market shifts.
- Track and analyze marketing results to improve placement success and client outcomes.
- Collaborate with producers and internal teams to identify cross-sell opportunities and support business growth.
- Perform online quoting and generate accurate proposals based on clients needs.

QUALIFICATIONS

- Must meet our value system.
- 3-5 years of commercial insurance experience would be ideal.
- Proficiency with Applied Systems Epic or similar agency management tools preferred but not required.
- Experience with ACORD applications.
- Strong analytical skills and attention to detail.
- Knowledge of industry regulations and market trends.
- Ability to thrive in a fast-paced, collaborative environment.

TO BE A TEAM MEMBER AT BIS, WE REQUIRE THESE VALUE SYSTEMS :

Follow Through

Solve all items and provide updates

Humble

Not arrogant

Heart to Serve

Genuinely care about others

Integrity

Do the right thing

Heart to Learn

Care about your craft and want to improve in life

Perspective

Don't take yourself too seriously and family is priority

