

**Renaissance Alliance Insurance Services, LLC**  
**Job Description**  
**Commercial Lines Account Executive**



**Job Title:** Commercial Lines Agency Advocate  
**Department:** Marketing & Account Placement Services (MAPS Team)  
**Reports To:** Chief Markets Officer  
**Status:** Exempt

### **Summary**

The Commercial Lines Account Executive (AKA in-house as the Agency Advocate) delivers the ultimate of value-added customer service and commercial lines marketing and account placement expertise that enable Renaissance Alliance member agencies to prosper and continually grow profitable commercial lines premium volume while meeting the current and future economic and competitive challenges to the existence of the independent insurance agency paradigm.

**Essential Duties and Responsibilities** include the following; other duties may be assigned based upon the qualifications of the candidate.

### **Primary Responsibilities**

- Establishes and maintains meaningful professional relationships with assigned member agency principals and commercial lines personnel through open and direct personal communications and provides timely and accurate information and assistance in the successful generation of new business and renewal retention of existing customer accounts.
- Manages and delivers commercial lines marketing and account placement services and expertise, and researches carriers' marketing material to search the marketplace for appropriate coverage for submissions. Informs and communicates with the agency regarding RAIS operational and procedural issues.
- Proactively promotes RAIS marketing and account placement initiatives, products, and specialty programs and educates assigned agencies principals and commercial lines staffs in the competitive advantages and specifics of RAIS value-added products and services.
- Effectively manages conflict resolution among carrier underwriters relating to marketing and account placement or related activities.
- Provides analysis of information regarding carrier underwriting preferences to agents and confirms market access for agents.
- Coordinates and gathers submission information to ensure proper placement of coverage in the time frame available for new business and remarket opportunities identified by assigned agency members.

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- Monitors status of quotes as they move through underwriting and rating to identify potential problems. Negotiates coverage and pricing as required to ensure delivery of quotes on or before established target dates. Assures all conditional requirements of binding are satisfied within required timeframes.
- Maintain a working knowledge of carrier appetites, underwriting guidelines, and the published rating programs for various RAIS carriers. Must also maintain a full understanding of the various carrier products for both coverage and pricing. Familiar with in-house rating software needed to provide comparative, competitive quotes for the submissions received from assigned agencies.
- Participates and collaborates with other RAIS functional teams and serves on assigned and/or voluntary company-wide projects and initiatives.
- Consistently adheres to and performs standard operating policies and procedures to ensure real-time data and metrics reporting integrity and accuracy in software applications including, but not limited to, RAIS agency and content management systems and proprietary insurance carrier rating systems.
- Performs back-up tasks and responsibilities for other team members as required.
- Other duties may be assigned.

**Supervisory Responsibility** – This job has no supervisory responsibility at this time.

**Competency**

- Effective time management skills
- Ability to multi task in a fast paced environment
- In-depth knowledge of Commercial Insurance, Risk Management and Loss Control strategies
- Takes initiative and proactively endeavors to improve product knowledge and expertise through on-the-job, self-study and/or formalized industry training

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**Qualifications** - To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- **Education and/or Experience** – Bachelor’s Degree (B.A.) from four-year college or university preferred and three or more years’ related insurance experience and/or training.
- **Software Knowledge and/or Equivalent Applications** – AMS 360, AFW, ImageRight, Microsoft Office (Excel, Word, Outlook) and carrier specific rating.
- **Language Skills** - Ability to read, analyzes, and interpret insurance coverage forms, applications and underwriting manuals; Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public
- **Reasoning Ability** - Ability to define problems collects data; Establish facts and draw valid conclusions; Ability to work within and follow defined authority guidelines and complies with various carriers’ restrictions; Ability to manage time and workload needs
- **Teamwork** - Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Contributes to building a positive team spirit; Puts success of team above own interest
- **Customer Service** - Delivers exemplary services in marketing & account placement activities; Listens carefully to agent concerns and proactively participate in effecting resolutions; Responds quickly to agent inquires; Ensures accuracy and quality control throughout the submission process; Collaborates and proactively communicates with internal Renaissance teams to further promote and foster the delivery of ultimate customer service to Renaissance agents
- **Adaptability** - Adapts to changes in the work environment; Changes approach or method to best fit the situation
- **Communication Skills** - Candidate must have the ability to communicate effectively with internal and external customers; Keeps appropriate persons up to date on relevant matters