

CLIENT MANAGER – PERSONAL INSURANCE

Job Description

Lacher | 215.723.4378 | www.lacherinsurance.com
632 East Broad Street, Souderton, PA 18964

JOB DESCRIPTION

We are a team on a mission to crush the complexity of employee benefits, risk, and insurance and business. We work with companies and families who want advisors to simplify their relationship with insurance and deliver results. If you enjoy interacting with clients on the phone and in-person and being their lead point of contact, then this role may be the perfect fit for you.

As a Client Manager, you are on the front line of our client service team. Each day you will be the lead liaison with our personal insurance clients to deliver a remarkable experience. You will be working with a team to answer client phone calls, meet with clients in-person, and process information at impressive speeds and attention to detail.

HERE IS WHAT YOU WILL DO:

- Serve as a communication and interpersonal link between our clients, insurance companies, and Advisors
- Answer and complete client questions and service requests
- Develop and determine the best designed policy for each client
- Discover and determine additional ways we can help clients with their particular needs
- Process applications, new policies, and renewals
- Underwrite and re-underwrite accounts
- Get your property & casualty (P&C) license

HERE IS WHAT YOU WILL BECOME:

Once you become a master of the responsibilities above, you will be a pro at crushing complexity for our clients and a trusted ally to our team members. The sky is the limit! Show us your drive, desire and goals to unleash other opportunities at Lacher. You will have the possibility to join committees, project teams, and/or explore other positions such as a Client Executive or Advisor.

WHAT YOU NEED TO BRING TO THE TABLE:

- Strong communication skills, attention to detail, and follow through
- Professional phone etiquette
- Proven track record of efficiency, accuracy, and data entry skills
- Proficiency with management systems, Excel, Word, email, databases, and web navigation
- Passion for delivering a remarkable client experience
- Ability to deliver complex information in a simple and easy to understand format
- A P&C license (if you don't have one, you must be licensed within the first six weeks of joining the team). You'll get a bonus if you get done in four weeks!
- Love working hard and being part of an amazing team!