

DIVISION/DEPARTMENT: Commercial Insurance – Independent Business Unit (IBU)		
JOB TITLE: Client Manager		
Reports to: Commercial Manager - Markham		
Level/Grade:	Type of position: <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Contractor	Hours 37.5/week
JOB SUMMARY: Responsible for the quality growth, retention and client satisfaction of IBU policy holders, generally classified as non-complex accounts.		
POSITION DESCRIPTION: <input type="checkbox"/> handling incoming/outgoing calls, e-mails and faxes, documenting the Broker Management System accordingly <input type="checkbox"/> review, acceptance and processing of new business, renewals, cancellations and policy changes <input type="checkbox"/> negotiating renewals and coverage changes with Insurers <input type="checkbox"/> responding to underwriter requests for underwriting information <input type="checkbox"/> new and renewal business marketing (documentation of premium and coverage analysis) <input type="checkbox"/> preparation of all client correspondence in accordance with appropriate procedure <input type="checkbox"/> monitoring and control of all follow up activity on the designated book, including new business, renewals, cancellation, policy change and claims <input type="checkbox"/> issuance of documents confirming coverage to interested parties <input type="checkbox"/> participation in specific IBU and general commercial lines planning, development of growth, retention, program development, continuous improvement goals and strategies and participation in the execution of agreed action plans.		
PERSONAL CHARACTERISTICS <ul style="list-style-type: none"> • Professional, ethical, friendly and courteous in all interactions with clients and co-workers • Committed team player capable of multi tasking and adaptable to change • Perform well in a busy operation, remain calm under pressure • Strong organizational, time management skills and ability to prioritize • Excellent written and oral communication skills • Decision maker • Positive customer service and sales attitude 		
QUALIFICATIONS <ul style="list-style-type: none"> • R.I.B.O. license required. • Minimum High School Diploma – post secondary education an asset • Less than 5 years insurance experience with minimum 3 year commercial exposure • Enrolled or working towards CAIB or C.I.P. • Familiarity with MS Suite of products 		
Email Applications to: Patty McNeil pmcneil@mcleanhallmark.com		

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