



***Innovative Solutions.
Traditional Values.***

POSITION DESCRIPTION

Position Title: Client Service Manager
Department: Business Insurance
Reports To: Commercial Lines Client Services Supervisor
FLSA Status: Non-Exempt
Effective Date: 4/1/2026

POSITION SUMMARY

The Client Service Manager independently manages an existing book of business providing exceptional service to our clients. This role works closely with the Business Insurance Executive to assure all of client's insurance needs are met.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Develop and maintain effective working relationships with Business Insurance Executives, Business Insurance Consultants, clients, and insurance carriers
- Input and maintain all electronic files/client information in the client management system while following established workflows and procedures
- Respond timely to all incoming telephone calls and emails including questions from clients, carriers and co-workers
- Complete client-ready Renewal Strategies and Proposals and finalize with bound coverages once renewed
- Prepare all binders, Certificates of Insurance, Evidence of Property, auto ID cards, E&S affidavits and other items related to the binding of new and renewal business
- Issue Certificates of Insurance including reviewing contractual insurance requirements for compliance
- Maintain integrity of the client management system by monitoring reports
- Review and process open activities daily
- Quote policies and endorsements in carrier websites when necessary and required by carriers
- Research client's insurance program and coverages to answer client questions
- Manage the renewal marketing process at renewal which includes: maintaining service timelines, reviewing applications for major changes from prior year and discuss inconsistencies with Business Insurance Executive before submitting, support the Business Insurance Executive in negotiating with underwriters, oversight of carrier responses to ensure renewal deadlines are met, detailed coverage comparison of quotes, regular communication to track progress with the Business Insurance Executive

McConkey Insurance & Benefits

2555 Kingston Road, Suite 100 ■ York, PA 17402

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- Delegate specific workflows, including Audits, Endorsements, Mid-Year Exposure Review and Policy Checking to Client Service Coordinators to process and review for delivery to client
- Attend and participate in all department and company meetings
- Perform other duties as assigned by management

KEY COMPETENCIES

- Strong attention to detail
- Resourceful, innovative approach to problem solving
- Strong communication skills both written and verbal
- Must be a team-player but can work independently to meet deadlines
- Ability to take direction yet show initiative to be proactive
- Interpersonal skills to build outstanding relationships and foster team environment

POSITION REQUIREMENTS

- College degree or advanced education strongly preferred
- Must maintain Property & Casualty insurance license at all times
- Once licensed, obtaining an insurance designation is strongly encouraged
- Proficient with Microsoft Office Suite, including Excel
- Proficiency in client management system and workflows; understanding integration between technology systems
- Participate in seminars and educational classes to develop skills and keep current of regulations and best practices

PHYSICAL REQUIREMENTS AND WORK ENVIRONMENT

- Extended periods of time in a sedentary position with ability to move about office to access office equipment and attend meetings
- Prolonged periods of working on a computer using keyboard
- Work environment includes interacting with others, participating in meetings, corresponding through email and phone calls
- Must be able to communicate effectively in English both verbally and in writing to internal and external clients
- Standard office hours are Monday through Friday, 8:00am to 5:00pm; working a 7.50 hour schedule
- Occasional out-of-office travel for client visits, educational opportunities, and company-wide meetings

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