



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

POSITION DESCRIPTION

Position Title: Personal Lines Client Service Manager
Department: Personal Insurance
Reports To: Personal Lines and Select Business Supervisor
FLSA Status: Non-Exempt
Effective: 3/1/2026

POSITION SUMMARY

The Client Service Manager independently manages an existing book of business providing exceptional service to our clients.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Services existing book of accounts including renewals, endorsements, binders, applications, etc.
- Upgrades, improves, and rounds out all current accounts
- Handles all client requests and servicing needs
- Maintains a thorough account file on all clients including proper transaction filing
- Quote with multiple carriers
- Run replacement cost estimators
- Answer client questions about their coverages/policies
- Follow-up on billing questions
- Enter all activities into agency management system
- Explain coverage differences to clients
- Ask for referrals
- Verifies accuracy of policies, endorsements, cancellations, renewals, and system data
- Requests home estimators, VI appraisals, driver information, and other pertinent data necessary for internal file or carrier file

KEY COMPETENCIES

- Provide exceptional client service
- 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

McConkey Insurance & Benefits

2555 Kingston Road, Suite 100 ■ York, PA 17402

PH: 717-755-9266 ■ F: 717-755-9237 ■ www.ekmccconkey.com



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- Interpersonal skills to build outstanding relationships and foster team environment

POSITION REQUIREMENTS

- Must hold a current Property & Casualty insurance license or obtain within 6 months from date-of-hire; company paid education and training
- Proficient with Microsoft Office Suite, including Excel
- Proficiency in agency management system and workflows; Epic experience preferred

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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