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POSITION DESCRIPTION

Position Title: Personal Lines Supervisor

Department: Personal Lines Department

Reports To: Assigned Vice President / Principal

FLSA Status: Exempt

POSITION SUMMARY

The Personal Lines Supervisor is a working supervisor responsible for managing a book of business while leading and supporting the Personal Lines team. This role requires strong technical insurance knowledge, leadership capability, and a commitment to team development and service excellence.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Develop, enhance, and maintain relationships with existing Personal Lines clients
- Assist Personal Lines Consultants with account acquisition and service, including accessing and entering information in carrier portals to obtain quotes for clients as needed
- Hire, train, and onboard new personnel in the Personal Lines Department
- Supervise and support Client Service Managers/Associates and Personal Lines Consultants
- Be actively engaged with the team by assisting with day-to-day questions and problem-solving
- Perform and review quarterly quality assurance audits in the agency management system to ensure accuracy and timeliness
- Accountable for the successful completion of departmental projects and the implementation of leadership initiatives
- Conduct employee performance evaluations and participate in salary review processes
- Maintain and update Personal Lines Department procedures and workflows to enhance efficiency and productivity
- Evaluate and manage integration of outsourcing resources
- Continue to evaluate new technology options to increase efficiencies within departments while maintaining high level of client communications
- Analyze team workloads and reallocate resources to balance workloads effectively
- Communicate regularly with the service team regarding updates, procedural changes, and department initiatives

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- Coordinate continuing education opportunities relevant to the personal lines industry
- Manage carrier relationships specific to Personal Lines
- Lead monthly Personal Lines Department team meetings
- Represent the Personal Lines Department on the Innovation Committee

KEY COMPETENCIES

- Resourceful, innovative approach to problem solving
- Initiative to work on multiple projects simultaneously and self-direct priorities to meet deadline driven business
- Dependability, high-energy and flexibility
- Strong communication skills both written and verbal, strong presentation skills

POSITION REQUIREMENTS

- College degree or advanced education strongly preferred
- Minimum of 10 years of experience in Personal Lines insurance
- Must maintain Property & Casualty insurance license and maintain all required continuing education credits for licensing renewal
- Proficient in Microsoft Office Suite
- Proficient in Applied Epic preferred with ability to follow and build workflows
- Attend all required department and company-wide meetings
- Participate in seminars and classes to develop skills and industry knowledge

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
- Occasional out-of-office travel, including overnight travel, is required
- Client appointments and work-related events will occasionally require attendance outside of standard office hours of 8:00am to 5:00pm