

## Job Description: Client Service Manager

**Job Purpose:** The Client Service Manager is accountable for delivering high quality and efficient service to both internal and external clients through the day-to-day account management of an assigned group of accounts within a Branch. This role reports directly into either the Client Service Director or the Client Service Supervisor. The Client Service Manager directly contributes to key business outcomes such as client retention, client satisfaction, enhancing AJG's value to our clients and prospects, achieving operating/margin targets and fostering a culture of performance and continuous improvement.

### Client Service Manager's Primary Areas of Focus:

- Delivers high quality client service consistent with AJG operational standards and practices
- Supports the business priorities of Branch Managers, Production team members and the Client Service function
- Consistently achieves or exceeds operational productivity and performance metrics

### Main Accountabilities:

- Successfully and profitably manages an assigned group of client accounts
- Builds relationships with existing clients by providing exceptional ongoing customer care
- In partnership with the Production team, takes a leadership role in the renewal process, ensuring that the best possible solution is delivered to the client in a high-quality and timely manner
- Secures existing business and drives the sale of additional services and lines of coverage
- Cultivates relationships with the buyer in the client organization as well as with day-to-day client representatives and buyers
- Resolves issues quickly in a manner that's appropriate for both the client and the Branch
- Establishes effective relationships with markets, knowing which markets to use for certain risks, etc.
- Manages to defined service timelines and processes
- Leverages systems, services and resources to execute work as effectively and efficiently as possible
- Supports one or more Producers and/or Account Executives and is the first line of contact when the Producer or Account Executive is not available
- Leads appropriate resources to address the client's risk management needs
- Escalates issues to Client Service Director or Client Service Supervisor as appropriate
- Coaches Client Service Associates through continuous learning, honest feedback, and strong talent development
- Executes on best practices, processes, leveraging existing systems and shared services
- Conducts periodic audits to ensure compliance to standards and service levels; Consistently adheres to service timelines and professional standards
- Communicates with carriers
- Supports other Branches and/or Regions as needed
- Maintains complete and accurate client and policy data and documents within the Gallagher systems
- Manages a book of business focused on retention and driving the sale of additional services and lines of coverage

### Critical Competencies:

- Comfortably engages others in a consultative discussion
- Keen understanding of professional and industry standards/practices
- Role model for high performance and Gallagher's shared values
- Consistently delivers high quality work on a timely basis
- Builds collaborative and mutually meaningful relationships with internal and external clients
- Comfortable analyzing and using data to make decisions
- Effectively balances a strong client focus with maximizing operational efficiency
- Quickly determines critical issues, detail oriented

- Solves problems quickly and focus solutions on the root cause
- Learns new systems, processes and skills quickly
- Works effectively as a team
- Works in a self-directed manner
- Focused on best practices for operations processes and procedures
- Effectively manages/balances multiple and sometimes competing priorities
- Facilitates and/or leads group meetings with internal and external clients
- Solid financial acumen

**Requirements:**

- Bachelor's degree with 3+ years client service and/or claims management experience –OR– High School degree/GED with 8+ years client service and/or claims management experience
- Producer's license
- Able to travel up to 25% of the time
- Proficient in Microsoft Office applications
- Strong written and verbal communication skills
- Proficient in using technology as a tool to maximize productivity and quality
- Previous experience managing client relationships
- Insurance knowledge – P&C experience preferred