

Account Executive Job Shadow

Questions

- What is the role of an Account Executive?
- What happens during a typical day for an Account Executive?
- What are the greatest challenges you face as an Account Executive?
- How do producers make your job easier or more difficult?
- What's most important for me to see and observe?

Steps

- Schedule two days of job shadowing, one day per week for the next two weeks, to observe an AE handling the following:

Customer Service

- Common issues
- Resolving problems

Carriers

- Common issues
- Resolving problems

Renewals

- Planning
- Renewal meetings

New Business

- Pre-sale activities
- Assisting with presentations
- Developing proposals