SAnta Maria rEcruiting services

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**CURRENT POSITONS INCLUDE BUT ARE NOT LIMITED TO:**

Account Executive

Assistant Claims Representative

Claims Representative

**See below for job descriptions:**

**Account Executive**

**Pay Scale:** salary + commission

**Responsibilities:** The Account Executive is responsible for …

1. Sell over 25 new business policies per month.
   1. Call lost business list each week.
   2. Call unsold quotes coming up for renewal each week.
   3. Call monoline accounts for account reviews and account rounding opportunities each week.
   4. Meet with one center of influence each week.
   5. Attend one networking event each week.
   6. Handle inbound calls, website contact forms and walk-ins looking for insurance
   7. Market all accounts and present proposals.
   8. Place business according to the goals of the agency.
2. Stop, listen, and ask questions of your customers in order to clearly understand their needs and to build solid relationships.
3. Identify training needs with assistance from managers. Develop a personal improvement plan and take responsibility for learning and improving technical and sales skills regularly.
4. Follow the new business sales process and maintain a closing ratio of over 50%.
   1. Connect with new inbound inquiries in under 5 minutes.
   2. Follow up with 5-6 phone calls on new web business.
   3. Complete all outbound calls each week (lost business, monoline account reviews and unsold business).
   4. Call and email the list once per week for 3 weeks, and mail a quote to anyone you did not connect with after 3 weeks.
   5. Provide new business cards to the marketing team to add them to marketing communications.
   6. Follow up with 5-6 phone calls after presenting pricing.
   7. Ask for referrals.
   8. Use strategies to sell policy features and avoid selling on price.
   9. Update TAM and use WinRater as directed by the agency processes.
   10. Prequalify insurance prospects for insurability and quality of risk.
   11. Obtain signed apps, payment, bind coverage and finalize all underwriting needs.
   12. Closing ratio will be monitored and adjusted as needed. The closing ratio is determined by the number of opportunities that are quoted vs. bound.
5. Work to improve agency retention with a goal of 93%.
6. Follow up with monoline business.
7. Account round all new business.
8. Follow up with new business 30 days after the point of sale and at renewal.
9. Identify networking group opportunities.
   1. Identify networking groups and events in the community.
   2. Attend a minimum of 4 community/networking events each month.
   3. Represent the company accordingly.
   4. Represent the agency as if it were your own.
10. Identify and connect with centers of influence.
    1. Conduct 1 meeting per week or 4 meetings per month with centers of influence.
    2. The goal is to connect with them to generate referrals.
    3. Introduce them to the partners page and encourage them to sign up.
11. Work to support the marketing and branding team in the following ways:
    1. Provide them any business cards to be entered into marketing campaigns.
    2. Suggest blog, email and social media topics to the marketing department.
    3. Share agency social media posts on personal social networks.
    4. Participate in pictures and agency branding opportunities when invited.
12. Be available to connect with prospects on their time. This includes responding to web forms in the evening and on weekends.
13. If licensed, you must be on call for the agency’s emergency line as designated monthly.
14. Other responsibilities as directed by your manager
15. Positive impressions on callers and visitors
16. Compliance with agency policies and procedures
17. Accurate and quality work at all times
18. Team cooperation and development
19. Participating in the development of marketing strategy and tactics
20. Correct and accurate filing of company documents
21. Actively seek ways to improve client service and communicate ideas for improved client service to superior positions
22. Respond quickly and professionally to client needs
23. Provide exceptional levels of caring and understanding to clients
24. Update spreadsheets, databases and any & all marketing programs with statistical, financial and non-financial information.
25. Assist with preparation and supporting community, networking or charity events.

**Accountabilities:** The Account Executive is expected to …

Comply with company policies as defined in the Employee Handbook and other company documentation

1. Fully support the company’s position on the importance of documented procedures and their consistent use by all staff:
   1. Comply with agency processes and procedures and utilize the documented procedures, when available
   2. Actively seek to improve the efficiency and effectiveness of the position’s duties and responsibilities
   3. Communicate and suggest ideas for improving agency processes and procedures, equipment and tools, or any other ideas that would benefit the agency
2. Always be polite and courteous to callers and visitors
3. Present a pleasant and enthusiastic personality at all times
4. Professionally perform assigned work as fast and efficiently as possible without sacrificing acceptable levels of quality
5. Keep all systems documentation up to date and improve that documentation on an on-going basis
6. Openly share technical and other know-how with team members to improve company operations overall
7. Participate fully in company meetings
8. Comply with departmental reporting requirements
9. Be a thinker involved in improving the company by creatively engaging in all aspects of personal responsibilities and company operations beyond the letter of the expectations defined in this Position Description
10. Accept and embrace changes in the position’s responsibilities that, in a dynamic and always-changing world and industry, are necessary from time to time
11. Participate in, and contribute to, ideas for improving the administration of the agency
12. Coach and mentor team members on technical & other skills

**Evaluation:** The Account Executive will be evaluated on …

1. Generated sales per month
2. Generated referrals per month
3. Compliance with company processes and procedures
4. Impact on callers and visitors
5. Speed and accuracy of work
6. Level of cooperation and participation
7. General observations of superior positions including COO
8. Compliance spot checks

**ASSISTANT CLAIMS REPRESENTATIVE**

We have a business with purpose and are looking for passionate, innovative people like you to join our team! OUR CLIENT has built a rewarding environment for Colleagues and continues to uphold our solid customer pledge by “Specializing in You”.

OUR CLIENT has over 600 employees across 3 time zones, 6 states, and 30+ locations nationwide. We are among the 50 largest insurance brokers in the US and are currently the 23rd largest privately held independent agency in the country.

We take pride in our welcoming and diverse culture, internal growth opportunity, and robust compensation and benefit package. OUR CLIENT provides our Colleagues with cutting edge resources, tools, and support so that we can be the best at what we do.

**SUMMARY:**

The Assistant Claims Representative is responsible for the accurate intake and processing of Commercial account claims, as well as the coordination of claims information between the agency, company, producer, insured(s) and claimants.

**ESSENTIAL FUNCTIONS:**

* Promptly and effectively manage the reporting of new claims, as well as follow through to conclusion, with moderate direction and oversight
* Process incoming telephone calls related to claims matters and report these claims to the appropriate insurance carrier
* Responsible for coordinating claims information between the agency, company and client
* Assist Claims Consultants and Commercial Lines department with claims and follow-up
* Input all loss notice ACORD forms and forward to the appropriate carrier
* Initiate and /or direct client/claimant correspondence, and telephone contact, as required on all claim activity
* Initiates and conducts claim follow-up, via proficient use of claims and related business systems
* Facilitate claims resolution through effective use of daily suspense follow-ups
* Maintain claims history and/or account file information by inputting all claims notes and payment activities in the agency management system
* Communicates proactively with each OUR CLIENT account service team to keep them apprised on the status of claims
* Effectively and courteously answer inquiries and questions from insureds and claimants
* Assist Claims and/or Risk consultants in periodically obtaining loss runs from appropriate insurance carriers on individual accounts

**KNOWLEDGE, SKILLS AND ABILITIES:**

* Basic knowledge of commercial line insurance coverage
* Property and Casualty claims training, or the ability to be quickly and effectively trained
* Ability to work within a fast paced, changing priority environment
* Self-motivated, with the initiative to prioritize and be self-directed
* Ability to operate a multi-line phone system
* Strong PC skills, specifically MS Office products and agency management systems
* Ability to effectively utilize agency management systems, as well as internet claims systems provided by various insurance carriers
* Regular and punctual attendance is required
* Ability to communicate effectively, both verbally, and in writing
* Excellent interpersonal skills, with the ability to interact effectively with both colleagues, and managers, across all levels
* Ability to promote, and maintain a team environment, willing to find accommodating solutions for our customers, companies and the Agency
* Ability to successfully adhere to company policies and procedures, as well as maintain strict confidentiality

**QUALIFICATIONS:**

* High school diploma or equivalent required
* Bachelor’s degree preferred
* 2-3 Years commercial insurance industry experience preferred

**WORKING CONDITIONS AND REASONABLE ACCOMMODATIONS:**

* Fast-paced, multi-tasking, office environment with periodic high disruption and changing priorities
* Ability to perform approximately 80% sedentary work, exerting up to 10 pounds of force occasionally, and negligible force frequently
* Ability to lift up to 20 pounds occasionally
* Requires operation of a computer workstation, including keyboard and video display
* *All requirements may be modified to reasonably accommodate physical or mental impairment*

**JOB PERFORMANCE STANDARDS:**

This job description is intended to describe the level of work required of the person performing the job. Essential functions are outlined. Other duties may be assigned as needs arise or as required to support the essential functions of the risk management department. Specific performance objectives may be developed each year to measure performance of the tasks and functions listed in this job description.

* OUR CLIENT has the right to revise this job description at any time. This job description is not intended as a contract and is subject to change and revision. Any written contractual agreements will supersede this job description.

**CLAIMS REPRESENTATIVE**

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**SUMMARY:**

The Claims Representative is responsible for providing claim advocacy and claim oversight services for property and casualty and worker’s compensation client losses including, but not limited to, assuring complete and sound claim settlements, investigation, providing clients and/or carrier adjusters with leadership, direction, and problem resolution, as well as reviewing and monitoring files to ensure adjusters are achieving desired quality and service levels and functions.

**ESSENTIAL FUNCTIONS:**

* Work in conjunction with the Claims Supervisor in the development and implementation of effective departmental performance and service standards
* Assist in the preparation, implementation and monitoring of the Risk Management Services department’s claims management plans and client service responsibilities
* Responsible for developing and maintaining close working relationships with team members, and production staff, consistently meeting the service needs of customers, and functioning as an integral member of the client’s risk management services team, working to maintain the quality and service standards of the agency
* Report new losses (all lines except work comp) to carriers as needed, updating EPIC with new & ongoing claims information
* Serve as a claims escalation point of contact, responding to difficult customers or claims situations with adjusters, as needed
* Answer inquiries and questions from insureds and claimants
* Follow up for subrogation, depending on the claim type
* Rectify with carriers the status of all open claims, ensuring appropriate documentation and resolution
* Provide management reports as required by senior management to monitor departmental performance
* Monitor claims resulting in lawsuit/large reserves loss and refer to Claims Consultant
* Work in conjunction with Loss Control & Risk Management Services to resolve high-level claims issues
* Inform producers/account managers and clients on status of claims, advising of claims settlements/reserves per established guidelines.
* Serve as a subject matter expert for the department staff, providing guidance and training, as needed
* Effectively maintain a thorough working knowledge of all company change procedures, communicating with department staff as needed
* Review all activities relating to the public, customers and companies to avoid issues involving potential errors and omissions
* Participate in seminars and other training to maintain required licenses and for knowledge and skill development

**KNOWLEDGE, SKILLS AND ABILITIES:**

* Self-starter, imaginative and creative with excellent problem solving skills
* Ability to listen to a question, analyze and work through the problem and explain the solution to the inquiring person so that he/she is confident in his/her ability to complete the task on their own
* Possess excellent negotiation skills.
* Ability to influence others and motivate staff to maintain high skill levels
* Organized and attentive to detail, with a good understanding of the claims workflow, systems and processes and a solid understanding of agency systems
* Intermediate PC skills with a focus on the Microsoft suite of products (Word, Excel, Outlook, Teams, etc.)
* Ability to work within a fast paced, changing priority environment
* Self-motivated, with the initiative to prioritize and be self-directed
* Regular and punctual attendance is required
* Ability to communicate effectively, both verbally, and in writing
* Excellent interpersonal skills, with the ability to interact effectively with both colleagues, customers and managers, across all levels
* Ability to promote, and maintain a team environment, willing to find accommodating solutions for our customers, companies and the Agency
* Ability to successfully adhere to company policies and procedures, as well as maintain strict confidentiality

**QUALIFICATIONS:**

* 6 – 8 Years previous workers’ compensation and property and casualty claims experience preferred
* Bachelor’s degree in business, or other related discipline preferred
* Possession of, or the ability to quickly obtain, all licenses as required by the Oklahoma State Department of Insurance
* Professional insurance designations preferred

**WORKING CONDITIONS AND REASONABLE ACCOMMODATIONS:**

* Fast-paced, multi-tasking, office environment with periodic high disruption and changing priorities
* Ability to perform approximately 80% sedentary work, exerting up to 10 pounds of force occasionally, and negligible force frequently
* Ability to lift up to 20 pounds occasionally
* Requires operation of a computer workstation, including keyboard and video display
* *All requirements may be modified to reasonably accommodate physical or mental impairment*

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