

Hotchkiss Insurance Agency, LLC
Job Description

Job Title: Account Associate I
Department: Commercial Lines/Program
Reports To: CL Manager/Director of Service

FLSA Status: Non-exempt
Prepared Date: 7/1/09

SUMMARY

Assist the Account Managers by processing policies, changes, renewals, rating, or in any other area, as instructed.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Process all polices and endorsements for team and issue related invoices.
- Locate and correct any discrepancies between applications and issued policies.
- Process certificates with various requirements with Account Manager assistance.
- Review invoices and correct any differences.
- Process and mail all renewal packets for team per agency timeline.
- Obtain Experience Modification Worksheets for team.
- Resolve problems identified and seek advice from CSR's as necessary.
- Maintain working knowledge of all company change procedures.
- Assist or fill-in for Customer Service Representatives as directed.
- Provide relief for the receptionist on a rotational basis and as needed.
- Document all activities and correspondence daily per agency guidelines
- Efficiently and effectively work backlogs.

ASSOCIATE RESPONSIBILITIES

Must follow all agency workflows, guidelines, and procedures including, but not limited to the contents of the Associate Handbook. Maintain a professional image at all times. Possess the general competencies needed to understand personal accountability and display emotional maturity. Prioritize daily workflows to meet agency standards; request assistance when needed.

Initial

GENERAL

- 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 agency's essential functions.
- This description is not intended as a contract and is subject to unilateral change and revision by management
- All requirements may be modified to reasonably accommodate physically or mentally challenged associates.

SUPERVISORY RESPONSIBILITIES

This job has no supervisory responsibilities.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

EDUCATION/EXPERIENCE

Must have some college coursework completed, a degree preferred. Minimum 1 year experience working in commercial insurance.

INDUSTRY LICENSING/EDUCATION

Property and Casualty license is required. Actively participate in continuing education classes. Begin working on the CISR designation.

INDUSTRY KNOWLEDGE

Knowledge of different coverage and the differences between standard carriers and surplus lines. Awareness of relevant industry news.

COMPUTER SKILLS

Possess a basic knowledge of Windows, Internet Explorer and Microsoft Office. Understand the functionality of TAM and how to navigate through the various carrier rating systems, Silverplume, and IIAT

COMMUNICATION SKILLS

Must be deemed to effectively speak, read, write, and comprehend English. Able to exercise judgment of proper verbal and written communication skills for a professional environment. Know who, how and what to ask to get information needed. Use all available resources to assist internal and external customers.

MATHEMATICAL SKILLS

Possess basic math skills and able to perform these basic operations using units of American money. Able to calculate premiums based on exposures and rates and apply payments and/or refunds to specific invoices and item numbers.

COMPANY KNOWLEDGE

Understand the background & vision of HIA and the importance of your individual LMS track. Recognize how personal performance impacts various agency functions and the company as a whole.

REASONING ABILITY

Apply common sense understanding to carry out detailed written or oral instructions. Identify and deal with problems involving a few concrete variables in standardized situations. Anticipate and resolve future problems before they occur. Take ownership of a problem and provide resolution beyond conventional solutions (think outside of the box). Solicit assistance from your team when necessary. Think and act at all times in the best interest of the Agency, Customers, and Carriers

Initial

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an associate to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the associate is regularly required to talk or hear. The associate frequently is required to sit and use hands to operate computer keyboard and telephone. The associate is occasionally required to stand, walk, and reach with hands and arms. The associate must occasionally lift and/or move up to 25 pounds.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an associate encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

This position works in a typical office environment. The noise level in the work environment is usually moderate.

I have read, understand, and agree to abide by the job description.

Signature

Date