



HICKOK & BOARDMAN
INSURANCE GROUP

Our History is Protecting your Future

POSITION DESCRIPTION

Position Title: Business Insurance Account Associate
Department: Business Insurance
Reports To: Supervisor, Next Generation Resources
FLSA Status: Non-Exempt

SUMMARY

The Business Insurance Account Associate, in cooperation with the Executive, Senior or Account Service Manager, is responsible for assisting new and renewal clients with service needs on accounts. Specific service responsibilities are assigned per guidelines, procedures, quality and service standards as stated by the agency. This is a 100% in house position.

ESSENTIAL RESPONSIBILITIES

- Provide service and support to Account Service Managers and/or Client Advisors on existing accounts and assist them in their delivery of commitments to clients.
 - Provide in house customer service to clients as assigned and requested.
- Assists renewal reviews and re-marketing as appropriate, to provide the client with the optimal solution in the coverage of their assets and the retention of the client. Prepares summaries of insurance for presentation to the client as directed by the ASM
 - Receive and review cancellations and act to save accounts as directed by the ASM or Client Advisor.
- Maintains client accounts on agency automation system, documents conversations, properly attaches documents to Agency Management System, sends confirmations to insured clients and adheres to all other automation procedures that are, or become, established. Maintains follow-up and suspense system for outstanding orders and correspondence, follows-up on overdue and suspense items. Responds to carrier requests for additional information in a timely manner.
- All of this is done in a manner to avoid potential E&O issues. Immediately notifies management of any potential E&O situation.

QUALIFICATIONS

Excellent communication, organizational, time-management, and customer service skills are required. Candidates must be able to effectively manage multiple tasks and work well both independently and as part of a team. Proficient knowledge of Microsoft Office and the internet is required.