Job Title: Client Coordinator
Department: Property & Casualty
Reports To: Dual – Team Leader, Client Services
Employment Status: Full-Time
Exemption Status: Exempt

Job Summary:

The position provides technical and administrative insurance support on behalf of clients to deliver the Plexus Client Service Platform. This involves interaction with clients as well as carriers to provide day-to-day service needs to insureds and prospects. Implements and coordinates workflow and tasks to provide customers with high level of service. Specific service and marketing responsibilities are required and outlined below.

Essential Functions:

- Provides technical support to Client Executive (CE) and/or Client Manager (CM) such as analyzing quotes and coverage forms, with direction from CE/CM. Premiums will range from small to mid-size.
- Gathers underwriting data for new and renewal business - includes generating insurance exposure checklists and sending them to clients. Requests loss runs from companies and assisting client in completing insurance applications independently or in conjunction with AE/AM.
- Submits applications (ACORD and specialty) and other underwriting data to various insurance companies with cover letters requesting quotes with various options. Follows-up to insure timely receipt of quotations and policies.
- Negotiates coverage with underwriter under direction/in conjunction with CE/CM.
- Helps identify exposure to loss and recommends appropriate coverages in co-ordination with CE/CM.
- Prepares insurance summaries, proposals, loss summaries, property/vehicle and other schedules as required with strict attention to detail and uniformity.
- Processes renewals in coordination with AE/AM according to operational procedures.

- Orders and issues binders/confirmation of insurance, endorsements and other related items, verifies their accuracy, forwards them to client with appropriate correspondence.
- Checks policies and endorsements for accuracy in a timely fashion to meet internal service standards.
- Reviews audits of policies and verify with client for accuracy, facilitates corrections as needed between client and carrier.
- Oversees certain administrative functions of associates within team, such as certificate issuance, auto ID cards, file making, scanning, photocopying, and document binding.
- Input of relevant data as required in Agency application system as well as setting up client electronic files.
- Determines if direct or agency billing is appropriate and invoices accordingly based on payment plan. Request finance quotations from finance company, send and follow-up with insured to bill accordingly if plan is accepted.
- Handles payment/billing issues with accounting department.
- Handles any payment collection issues with help of AE/AM where needed.
- Handles incoming mail and phone requests, responding promptly and appropriately.
- Assists client in submitting first reports of claims, facilitates prompt response from carrier staff and follows up on claim status, according to agency procedures.
- Builds and maintains effective relationships with clients, carrier, co-workers, vendors and other business contacts.
- Keeps informed regarding industry information, new product information, legislation, coverages, and technology to continuously improve knowledge and performance.

Non-Essential Job Duties:

- Participate in managing and front desk and phone rotation when the agency receptionist is out.
- Any other duties as requested by management.

Knowledge, Skills and Abilities

- BA/BS or 5 years insurance experience; insurance designation, and/or equivalent combination of education and experience.
- Ability to communicate orally and in writing to others to explain complex issues, receives and interprets complex information, and responds in an appropriate, professional manner.

- Adept at on-line rating and booking and insurance systems to provide accurate and timely responses to clients, potential clients and carriers.
- Ability to work independently, as well as in co-ordination with other members of team.
- Ability to set priorities and manages work flow to ensure efficient, timely and accurate processing of transactions and other responsibilities.
- Working knowledge of P&C insurance products and usage.
- Working knowledge of insurance markets and their reference to markets
- High level knowledge of computer and word processing programs such as Microsoft Office Programs (Word, Excel, Outlook), and agency management systems.
- Expected to maximize efficiencies using good organizational skills to prioritize and complete tasks in requested timeframes.
- Property and Casualty Agents license – Illinois.

LANGUAGE SKILLS

Ability to read, write, speak, and interpret routine reports, loss runs, and general correspondence in English.

REASONING ABILITY

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems utilizing own knowledge base or other internal and external resources.

PHYSICAL DEMANDS

Includes sitting, standing, walking and use of hands and arms to operate office equipment. The ability to sit at a desk for extended periods of time. Ability to lift and carry client files. The ability to read at a distance close to the eyes, with or without correction. The ability to hear (with or without mechanical assistance) sufficient to understand and comprehend individual one-on-one conversations.

WORK ENVIRONMENT

Business casual office where the noise level in the work environment is usually moderate consisting of interaction with clients as well as other employees in the office.