



Employee Benefits Client Service Representative

Reports to: Craig Menne
Status: Full-time, non-exempt

About General Insurance Services

General Insurance Services is a full service independent insurance agency with over 80 years of experience serving Northwest Indiana, Southwest Michigan, and many accounts in the greater Chicago market. Our mission is to “secure the future of the communities we serve” through not only our work, but our community outreach as well. We invest in our team members through training and development to help them reach their career goals and personal aspirations.

At General Insurance Services:

- We offer a competitive salary and benefits package.
- We provide ongoing training to help you learn your job.
- We deliver constant coaching and feedback to help you develop your skill.
- We encourage professional development.
- We support individual volunteer efforts within the community

General Insurance Services was recently named one of the “Best Places to Work in Indiana.” Our office is growing, and we are looking to train the right individual to fit right into our company. If you are motivated to succeed and would like to join our team, please complete our application. We will follow up with you on the next steps in the interview process.

Benefits

Benefits include Medical, Dental, Vision, 401k, Paid Time Off and Life Insurance.

Purpose

The Employee Benefits Client Service Representative corresponds with all parties and processes all related documents to provide timely and accurate guidance and service to Group Health clients to enable producer to solicit new business

Responsibilities:

1. Ensure customer satisfaction, growth and retention of business by providing top quality service and problem solving.
 - a. Respond to all incoming calls, voicemails and emails from employers, employees, and company personnel, ideally within the same day.
 - b. Provide quotes and process administrative and/or policy changes per client’s request. Follow up with company.
2. Process new and renewal group business to companies for quoting and policy issuance.
 - a. Create new client’s database for producer on Benefit Point.
 - b. Download renewals, attach to Benefit Point and assist with alternate quotes.

- c. Submit new Group Business and follow through on all issues.
 - d. Order and/or print materials required to assemble Employee Packets for group employee meetings.
3. Document client's account status clearly, accurately and completely to allow others to effectively work the account.
 - a. Scan and attach all client related items to client's account, including applications, quotes, benefit summaries, and correspondence.
 - b. Document all client activity by the end of the business day in an easy to understand manner.
 - c. Client activity includes any communication by any means, any potential change and progress notes.
4. Correspond with company personnel, clients, and producer to assure accuracy and policy continuity.
 - a. Process policy change requests and follow up with company.
 - b. Follow up on all company requests and coordinate necessary communication with producer.
 - c. Update Benefit Point with benefit summary information for renewals and new business.
5. Keep up to date on customer accounts; correct/update data; communicate findings or outcomes to producers.
 - a. Run renewal reports.
 - b. Retrieve data to assure producer has adequate time to lock in renewals.
6. Assist producer, as requested and office with day-to-day functioning, not limited to:
 - a. Process all incoming mail. Scan to customers' files and correspond as appropriate.
 - b. Assist producer by providing quotes, correspondence, and remarketing accounts, as requested.
 - c. Assure all company enrollment materials and administrative forms are current.
 - d. Update GIS Intranet as carrier changes, group forms, and commission schedules change.
 - e. Assist Individual Life and Health Agent, Individual Life and Health Representative and Account Manager, as requested.
 - f. Clerical support may include acting as receptionist, accepting customer payments, recording/uploading payment, making the bank deposits for the office and picking up/dropping off mail at the post office or another office as needed.
7. Licensing & Contracting
 - a. Complete agent and agency contracting paperwork for new carriers.
 - b. Resolve any licensing or contracting issues with carriers.
8. Acts as a back-up to Account Manager, as needed. Prepare census, complete FormFire enrollments, and submit quote requests to carriers for new business and renewals. Review quotes when received for correct census and plan choices.
9. Provide regular front desk coverage relief.
 - a. Clerical support may include acting as receptionist, accepting customer payments and recording/uploading payments.

Knowledge, Skills, and Abilities:

1. Indiana Life and Health agent's license is required.
2. Meeting compliance for Non-Registered Fingerprinted Person standards, is required.
3. A general understanding of all products within 90 days of employment.
4. This fast paced position requires an Associate or Bachelor degree or equivalent business experience; the ability to read quickly with good comprehension; the ability to write using good grammar and punctuation and precise mathematical skills.
5. The ability to access and maneuver company websites for forms, application and renewal status, quoting information and submission.
6. Professionally maintains confidential information.
7. Empathic listening skills and careful speaking skills.
8. A thorough knowledge of the phone system, including the ability to transfer calls and conference call.
9. The ability to use Outlook to send and receive emails including attachments.
10. The ability to utilize the in-house software systems within 60 days of employment. These skills include using the Genifax, scanning and attaching appropriate items in Benefit Point.

Physical Demands and Working Conditions:

- Viewing computer terminal, perceiving and transcribing data with accuracy and keyboarding fill much of the day in an office environment.
- Communication with telephone callers and associates requires an ability to express oneself as well as perceive and exchange ideas.
- The employee is not exposed to adverse environmental conditions, working primarily in an office environment.
- Sedentary work. Exerting up to 10 pounds of force occasionally and/or negligible amount of force. Work can require stooping, kneeling, crouching, as well as grasping objects, and reaching with hands and arms.
- The employee is occasionally required to stand and walk.
- The employee is occasionally required to travel to meetings and enrollment events which may require driving, walking, and climbing/descending stairs.