



Commercial Lines Processor

Reports to: Kathy Henrich
Status: Full-time, non-exempt
Office: Any Office

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 Commercial Lines Processor corresponds with all parties and processes all related documents to provide timely and accurate guidance and service to Commercial Lines customers and agent.

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 clients, ideally within the same day.
 - b. Issue certificates and bonds.
 - c. Accept payments, write receipts, upload payment to company and note activity in client account.
 - d. Change policies, per customer request.
2. Process and invoice new and renewal business.

- a. Enter submissions/applications for agent on AMS.
 - b. Research certificate requirements. Contact underwriters and determine what can be done at what cost.
 - c. Process policy change requests from insured. Follow up with company.
 - d. Process Binders, EPI's, Auto cards, etc.
 - e. Prepare finance agreements.
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 all related items received and information retrieved from company websites.
 - 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 underwriters, insured's, and agent to assure accuracy and policy continuity.
 - a. Submit renewal business to companies for quoting and policy issuance.
 - b. Submit change requests to companies or process directly.
 - c. Follow up on all underwriter requests and coordinate necessary communication with agent.
 - d. Update coverage summaries or run the summary of insurance out of AMS for renewals.
5. Keep up to date on customer accounts; retrieves and correct/update data; communicate findings or outcomes to agents.
 - a. Keep agent apprised of any outstanding invoices, cancellations, or reinstatements.
 - b. Run reports weekly. Follow up on unbilled and expired accounts. Keep track to assure coverage is bound.
 - c. Run monthly statements and issue invoices. Follow up to assure timely payment. Keep track of aged accounts.
 - d. Retrieve data to assure agent has adequate time to lock in renewals.
 - e. Run Motor Vehicle Report, as needed.
6. Assist agent and office with day-to-day functioning.
 - a. Process all incoming mail; not limited to audits, bonds, endorsements and endorsement requests, and certificate requests. Scan to customer's file and correspond as appropriate.
 - b. Assist agent by providing quotes, remarketing accounts, and correspondence, as requested.
 - c. Financial support may include preparing deposits, typing check requests, opening, and locking cash box, ordering supplies, and going to the bank.
 - d. 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.
 - e. Provide regular front desk coverage relief.

Knowledge, Skills, and Abilities:

1. Indiana Property and Casualty agent's license is required.
2. This fast-paced CSR position requires an Associate or Bachelor's 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.
3. The ability to deftly access all company websites for billing information and uploading endorsements.
4. Empathic listening skills and careful speaking skills.
5. A thorough knowledge of the phone system, including the ability to transfer calls and conference call.
6. The ability to use Outlook to send and receive emails including attachments.
7. 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 AMS; a working knowledge TransactNow and company websites.

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.
- Reliable physical attendance is required.