



**Job Description:** Commercial Insurance Account Coordinator

**Reports to:** Director of Client Service

**Accountable for:** Assisting Account Manager (s) with service and retention on all commercial accounts.

**Duties and Responsibilities:**

- Provide client service as needed.
- EBU policy checking
- Monitor certificate Inbox and Issue certificates
- Assist with client booklet assembly
- Follow up calls to carriers and insureds for information requests.
- Check and process audits.
- Check and process endorsements.
- Retrieval and entry of claim information and updates from carrier into TAM.
- Create monthly expiration spreadsheet for department and Account Managers
- Scanning and attaching documents to client files.
- Review and update TAM activities daily.
- Paper filing as needed.
- Process dead and destroy policies.
- Back-up departmental teammates.
- Attend carrier and client meetings as requested.

**Agency Administrative Support:**

- Share back up Office Coordinator responsibilities including lunch three days per week.
- Primary bathroom and coffee break phone back up for Office Coordinator. Phones may be answered from workstation.
- Serve as primary back up when Office Coordinator is sick or out of the office for partial days or up to two consecutive days. If Office Coordinator will be absent for more than two days, she will create a schedule to include additional staff members (but to include Commercial Account Coordinator) in advance of the time off.
- Individuals taking vacation are responsible for finding back-up coverage for regularly scheduled Office Coordinator duties.

**Agency Standards:**

- Review and update TAM activities daily
- Provide detailed documentation of all transactions, emails and conversations in TAM
- Follow procedures
- Meet deadlines
- Respond to internal and external requests by end of day and set expectations
- Work product is accurate, complete, properly formatted and professional
- All written communications use proper formatting, punctuation, spelling and tone
- Back-up and support all department team members
- Participate in carrier meetings as needed, stay up to date with partner carrier information and carrier markets
- Update required scorecards for review in weekly department level 10 meeting
- Attend and participate in Level 10 meetings
- Contribute to and own your department and individual rocks
- Participate in agency quarterly community service
- Participate in quarterly 5-5-5 meeting
- Participate in annual review
- Demonstrate the Baker-Hopp Core Purpose and all Core Values
- Act as coach and mentor to all team members
- Achieve personal and professional development annual goal
- Keep workspace neat and organized
- Microsoft Outlook - maintain <250 emails in inbox; <1000 emails in deleted; <1000 emails in sent
- Maintain insurance license (if applicable)

**Qualifications:**

- One year experience in a professional office setting.
- Excellent oral and written communication skills.
- Proficient in Excel and Word