



Position Title and Department

Broker Support Representative, Commercial Solutions

Purpose

To support the Company to best meet customers' insurance needs and exceed service expectations by providing administrative support, data entry, and detecting potential errors and/or omissions in the execution of the Company's processes. To provide quality control and auditing support so as to contribute to the continual improvement of the overall quality of the Company's services.

Relationships

Report to: Vice President, Commercial Solutions

Direct Reports: None

Responsibilities

- Assist the Company's brokers in facilitating policy transactions on behalf of the customer(s), as required, with the Company's insurance company partners while meeting or exceeding the Company's service standards, such as:
 - New policy(ies)
 - Mid-term endorsements and/or cancellations
 - Renewal of policy(ies)
 - Invoicing
 - Claims
 - Any other policy transactions
- Audit and review customer and policy information to ensure it is complete, accurate, and up-to-date, including:
 - Premium
 - Coverage and deductibles
 - Risk exposures
 - Rating and/or underwriting information
- Stay informed of underwriting guidelines, protocols, and authority for the Company's insurance company partners
- Stay informed of industry developments, such as new insurance coverage and policy(ies) as well as changes to existing insurance coverage and policy(ies)
- Assist the Company's brokers in advocating on behalf of customer(s) best interests in dealings with the Company's insurance company partners
- Ensure thorough and complete documentation and reporting is maintained for all activity and correspondence pertaining to any and all customer(s) and/or policy(ies) records
- Maintain a high degree of privacy and confidentiality
- Prepare for, attend, and participate in meetings, as needed
- Provide back-up for team members as needed
- Provide administrative support for the Company as needed
- Give due consideration to participating in the Company's internal committees
- Actively and continuously research and pursue educational and professional development opportunities
- Seek opportunities to support co-workers in their own pursuit of educational and professional development
- Execute the responsibilities of the position in a courteous and professional manner, consistent with the Company's values, so as to enhance the Company's reputation

Skills/Competencies

- Strong communication skills across multiple media
- Strong reading comprehension skills
- Strong organizational and time management skills
- High attention to detail
- Experience with Windows and Microsoft Office
- High school diploma or equivalent