



## **COMMERCIAL LINES CLIENT SERVICE ASSISTANT**

Bateman, Gordon & Sands, Inc. – Lighthouse Point, FL

The Commercial Lines Client Service Assistant is responsible for assisting Account Managers and Producers with the servicing of tasks in accordance with the practices, policies and procedures of the Company.

### **RESPONSIBILITIES**

- Adhere to agency policy as established
- Ensure high levels of customer satisfaction and customer service in ongoing service delivery methods.
- Initiate and prepare endorsement requests for Commercial Lines clients per their requests.
- Prepare and process cancellations when required.
- Review all policies, endorsements and audits for accuracy.
- Prepare account summaries as required.
- Prepare ID cards and policy books.
- Maintain a suspense system to follow up on outstanding orders, correspondence, reports and overdue items in agency automation system.
- Document all client activity in the agency automation system.
- Keep current on rates, forms and coverage changes through circulars, bulletins, trade publications, seminars and schools offered.
- Participate in seminars and classes for skill and knowledge development in the agency.
- Document all client activity in the agency automation system.
- Assist in servicing commercial lines accounts by recognizing gaps in coverage, thus preventing our E & O exposures.
- Assist with new business, marketing, sales and placement.
- Assisting with small business unit desk by moving existing book from E&S markets to standard markets.
- Prioritize workload and/or request for assistance as required.
- Assist other agency departments in securing and/or providing information necessary to issue appropriate policies in their department for which we have a mutual client.
- When directed by producer or account manager, every 30 days, initiates a status or a follow-up on all open or unsettled claims that are being handled by an outside adjustor.

- Keep Account Managers fully informed of all-important activities and issues on their accounts.
- Coordinate expirations with account manager to obtain renewal and/or new business information for preparation of Certificates. Sample COI must be approved by account manager and attached to client file.
- Obtain Motor Vehicle Reports.
- Send certificate holder and AI lists to clients for updates according to agency procedure prior to renewal.
- Receive requests from clients regarding Evidence of Property Insurance and Certificates and comply with the request and/or refer to the producer or account manager only when necessary.
- Prepare and process all requests for certificates of insurance as required within 24 hours of request.
- Obtain or request loss runs from carriers.
- Learn other commercial lines functions as introduced such as renewal applications, new business applications, renewal update letters in order to assist the account manager and the small business unit to focus on their important issues.

**Education and/or Experience:**

High school diploma or general education degree (GED); and minimum two years related experience and/or training; or equivalent combination of education and experience.

**Language Skills:**

Must be able to perform the following in English. Ability to read and interpret documents and general business periodicals, safety rules, professional journals, technical procedure, government regulations and procedure manuals. Ability to write routine reports, business correspondence. Ability to speak and effectively present information before groups of customers or employees of organization and respond to questions from groups of managers, clients, customers and the general public.

**Mathematical Skills:**

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ration, and percent and to draw and interpret bar graphs. Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.

**Reasoning Ability:**

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations. Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited

standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form. Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

**Certificates, Licenses, Registrations:**

4-40 or 2-20 State of Florida license (4-40 is in-office only per State of Florida)

**Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually quiet to moderate.

**Confidentiality:**

Staff will be exposed to confidential material. It will be their responsibility to maintain the confidentiality of such material in the strictest manner. Any violations of the confidentiality of records can result in immediate dismissal for cause.