

## **CLIENT EXECUTIVE SERVICE – XLP**

**DEPARTMENT: BUSINESS INSURANCE**

**STATUS: EXEMPT**

**REPORTS TO: DIRECTOR, CLIENT SERVICES**

### **SUMMARY**

Partnering with another Client Executive Service, this position is responsible for ongoing account service, renewal activities and claims review for the XLP account. This position provides leadership and risk management expertise for the XLP service team.

### **ESSENTIAL DUTIES & RESPONSIBILITIES**

- **Oversee ongoing account service activities.**
  - Deliver invoices and manage/collect receivables in conjunction with Client Sales Executive.
  - Meet regularly with Client Sales Executive to update, advise, educate and inform of recent industry trends and events.
  - Coordinate activities on XLP account.
  - Review and deliver summaries, proposals and policies.
  - Evaluate claims data and advise client on risk management needs.
  - Present and participate in meetings with client.
  - Maintain current Insurance Summary on account.
  - Update COW's annually on all account.
  - Meet World Class Client service commitments (Stewardship Report, Pre-Renewal Meetings, etc.)
  - Coordinate coverage placement by providing direction to the service team.
- **Manage all facets of renewal process.**
  - Manage strategy development and Initiate client contact to coordinate renewal strategy meetings.
  - Gather renewal underwriting information to prepare and update underwriting specifications.
  - Coordinate coverage placement through instructions provided to Marketing and Client Administrator, review and deliver binders, invoices, etc.
  - Advise and inform Client Sales Executive of recent account specific factors which may affect Carrier quotes or requirements.
  - Prepare and deliver proposals and advise client of coverage options available.
  - Manage policy expiration date.

- Provide effective claim advocacy and management.
  - Develop and maintain computer based task system of events and diary of routine status updates for E&O claims and actively manage assigned claims independently.
  - Participate and present successfully oral and written E&O claims at client claim reviews and demonstrate B&B's added value and advocacy of claims.
  - Review and summarize coverage positions, including evaluation of coverage denials and reservations of rights, as to appropriateness and present analysis and recommendations to clients.
  - Review, strategize and make recommendations of next steps for disputed or denied claims as well as complex claims involving multiple carriers or layers and large loss claims.
  - Identify when claims intervention is necessary and advocate on behalf of clients to reduce reserves and successfully resolve disputed /denied claims.
  - Identify and address steps which can be taken to transfer risk and/or subrogate claims.
  - Ensure key internal associates and clients are apprised of claim status including responding to request or questions from the service team and clients.
  - Identify and notify producers and service teams of large complex claims, claims that have potential coverage obstacles, denied or disputed claims and your strategy to work with the adjuster to resolve issues.
- Act as a leader for the service team members.
  - Create an environment oriented to trust, open communication, and cohesive team effort.
  - Facilitate problem solving and collaboration when faced with client difficulties.
  - Focus the team on the internal and external client requirements, familiarizing them with client specifications, work procedures and processes, quality standards, techniques and tools to support task performance.
  - Ensure deliverables are prepared to satisfy client requirements, cost and schedule.
  - Work closely with department Manager and Director of Client Services to obtain necessary resources to support the team's requirements, discuss project impediments, and to escalate issues which cannot be resolved by the team.
- Establish and consistently maintain effective and positive working relationships with Associates and clients.

## EDUCATION AND/OR EXPERIENCE

Successful candidate will be a service oriented individual with high personal standards and a hands-on work style. This position requires an individual who is comfortable working at a varying pace, managing multiple tasks and deadlines simultaneously, adjusting priorities often, and managing interruptions.

This position interacts with and provides service to a large group of internal associates and has high levels of contact with external vendors. The Client Service Executive - XLP must be positive and approachable, and work effectively with diverse personalities. In addition, the following is required unless otherwise noted:

- Bachelor's degree plus 3 or more years of daily World Class Client service experience is required; or, a minimum of 6 years industry experience showing increasing responsibility directly related to the performance of the above duties including 3 or more years of daily World Class Client service.
- Maintain a valid unrestricted California Fire & Casualty Solicitors license and a valid Driver's License.
- Achieve and maintain advanced insurance designations applicable to the above duties such as CPCU or CIC designations.
- Excellent understanding of insurance terminology, trends and factor influencing the industry, and the various lines of Business Insurance insurance.
- Proficiency with personal computers and Microsoft Office applications (i.e., Word, Excel and PowerPoint) with the ability to operate standard office equipment is required.
- Prioritize tasks, set and achieve goals, think logically in solving problems and present results neatly, with clarity and precision in both oral and written form.
- Ability to present complicated information to a variety of interest groups in a clear and unambiguous way, connecting with the group in terms of style and content.

## WORK ENVIRONMENT & PHYSICAL DEMANDS

- Ability to use computer keyboard and sit in a stationary position for extended periods as well as the use of office equipment such as fax and copy machines, and telephones.
- Work is performed in a typical interior/office work environment.
- Travel to client sites will be required. Usually travel is within driving distance, but may occasionally consist of a 1 to 2 night stay.