

BUSINESS INSURANCE SERVICES TRAINEE

DEPARTMENT: BUSINESS INSURANCE

STATUS: NON-EXEMPT

REPORTS TO: BUSINESS INSURANCE DIVISION MANAGER (WALNUT CREEK)

BUSINESS INSURANCE TRAINER (SAN DIEGO)

SUMMARY

This position prepares individuals to progress into the Insurance Associate position with potential ongoing advancement in to the Client Administrator, Client Manager and Client Executive positions, each building on the previous positions skills. Trainees typically work independently on either the mail desk or the loss run desk. Trainees are under close supervision and performance is monitored to determine qualification for advancement as opportunities arise.

ESSENTIAL DUTIES & RESPONSIBILITIES

As a training position, there are similarities between trainees' day-to-day tasks. However, individual duties and projects are assigned and rotated to develop familiarity with the department, its functions, and associates.

- Respond to departmental requests for administrative assistance with the following:
 - Create Word documents and Excel spreadsheets.
 - Assist in maintaining files and records in eMMA
 - Set up client shells in Sagitta.
 - Provide clerical assistance with copying, faxing, mass mailings, assembling binders and scanning files as needed.
 - Daily Download Department mail from Insurance Carrier Websites.
 - Sort, scan and distribute via ImageRight Tasks mail and communications daily.
 - Handle special projects as assigned.
- Process Loss Run reports.
 - Request loss runs based on monthly reports and in accordance with the carrier's requirements.
 - Follow up with the carrier or wholesaler until loss run is received and filed in electronic filing system.
 - Inform Client Administrator/ Manager if the loss run will be delayed.
 - Process Rush requests as needed.
- Establish and maintain effective working relations with other associates.
- Identify needs and competencies to be acquired for advancement, and make use of appropriate training opportunities.
- Communicate system or process related problems to supervisor.
- Plan ahead and problem solve - anticipate, report, and help resolve problems that may occur. Start learning coverages by reading Kaplan books and attending coverage training classes when offered.
- Enrollment in AIS or AINS designation course.
- If potential for advancement is recognized by supervisor, enrollment in insurance licensing school and passing the Property & Casualty licensing test is required for advancement.

EDUCATION AND/OR EXPERIENCE

Trainees serve a large group of people. They need to be engaged, positive and approachable by everyone. They must interact effectively with widely diverse personalities. In addition, the following is required:

- A bachelor's degree or ability to receive the degree within two to three months, or 1-3 years of experience performing in a professional administrative or customer service capacity is required.
- Proficient with Microsoft Office software (Word, Excel, and Outlook).
- Successful work history demonstrating reliability and a positive attitude.
- Demonstrated ability to prioritize tasks, and set and achieve goals.
- Demonstrated ability to think logically in solving problems assigned and present results neatly, with clarity and precision in oral and written form.
- Attention to detail and an appreciation for a job well done.

WORK ENVIRONMENT & PHYSICAL DEMANDS

- Ability to use computer keyboard and sit in a stationary position for extended periods as well as use office machinery such as fax and copy machines, and telephones.
- Work is performed in a typical interior/office work environment.