



JOB TITLE: Client Services Specialist

SUMMARY: Provides support to Client Managers to manage all assigned accounts.

DUTIES AND RESPONSIBILITIES:

- Processes certificates of insurance (COI), binders, evidences, auto ID cards, applications, renewal requests, endorsements, premium finance agreements, and claim data.
- Responsible for initial input of account, contact, and policy details into EPIC.
- Follow up with carriers on status and receipt of all policies, endorsements, and cancellations. Coordinates resolution of pending issues.
- Performs online carrier ratings.
- Secure loss runs, experience modification worksheets, and MVRs, FR-19's; orders and follows up on loss runs when requested.
- Prepares proposals, analysis and summaries as needed.
- Manages billing inquiries and cancellation notices; provides billing support to Client Manager as needed.
- Performs other related duties as assigned by management.

QUALIFICATIONS:

- Associate's Degree (AA) or equivalent from a two-year college or technical school, or six months to one year related experience and/or training, or equivalent combination of education and experience.
- Hold Maryland Property and Casualty Insurance license, or progress towards licensure.
- Computer skills required: Microsoft Office Suite, EPIC Online Database software.

COMPETENCIES:

- **Customer Service** - Manages challenging customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service and assistance; Meets commitments.
- **Interpersonal Skills** - Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things.
- **Organizational Support** - Follows policies and procedures; Completes administrative tasks correctly and on time; Supports organization's goals and values.
- **Problem Solving** - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.

- **Professionalism** - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments.

PHYSICAL DEMANDS AND WORK ENVIRONMENT:

- Occasionally required to stand/walk; frequently required to sit; continually required to utilize hand and finger dexterity and to talk or hear. Normal office environment.

The above is intended to describe the general content of and requirements for the performance of this job. It is not an exhaustive statement of requirements. Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.