

VISION OF THE ROLE:

The Administrative Coordinator handles a variety of tasks and projects within their team on behalf of clients. This person must exemplify the high standards of the agency in communication, appearance and overall professionalism. The Administrative Coordinator must have great attention to detail and a willingness to proactively take on administrative duties such as taking calls, handling mail, answering client questions, and following agency processes designed to take care of our clients.

— EXPECTED OUTCOMES:

- High Client Satisfaction and retention
- Rapid response to client service requests
- Seamless support of the Commercial Lines team
- Mastery and full usage of Applied Epic
- P&C renewals completed 15-30 days in advance of expiration dates

— MAJOR ACTIONS OR INITIATIVES:

- Complete strategic projects on behalf of clients, the team, and the agency as a whole
- Study the policies and programs of the assigned book of business
- Review all policies and procedures for client service and use of Applied Epic

— ROUTINES:

- Process incoming and outgoing agency mail within the agency management system.
- Handle client-facing administrative duties such as taking payments, endorsing policies, etc.
- Perform data entry and other detail-oriented work.
- Handle client renewals and ad hoc service requests.

— DESIRED QUALIFICATIONS:

- Administrative experience
- Business related degree is a plus
- Proficiency in Microsoft Office applications
- Exceptional organizational and communication skills
- Willingness to pursue a path for professional development
- Willingness to obtain Property & Casualty License

— DEFINING SUCCESS:

- Makes prospects and clients feel like they are extremely valued
- Considered approachable and friendly by colleagues
- Proactively learns how to use agency systems including the phone, computer, and other technology
- Looks for ways to help everyone they interact with
- Sees problems and addresses them proactively with team members and leadership
- First to volunteer to take on challenging admin tasks
- Finds ways to increase both the speed and accuracy of repetitive tasks