Campbell Insurance Job Description

 Employee Benefits Account Manager

 Employer Information

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| **Organization Name:** | Campbell Insurance |
| **Website:** | www.campbellins.com |
| **Department:** | Employee Benefits |
| **Division:** | Campbell Insurance - Main Office |
| **Reports To:** | Vicky Rosser |
| **Job Location:** | Lynchburg, VA-24504 |
| **Hours/Week:** | 37.5 |
| **FLSA Status:** |  Non-Exempt |

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| Benefits |

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| * **401K**
* **ESOP**
* **Health Insurance**
* **Life Insurance**
* **Holidays**
* **PTO**
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 Job Purpose

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| Process applications for and changes to insurance policies. Duties include reviewing insurance applications to ensure that all questions have been answered, compiling data on insurance policy changes, changing policy records to conform to insured party's specifications, and verifying the accuracy of insurance company records. |

 Tasks

* Process and record new insurance policies and claims.
* Correspond with insured or agent to obtain information or inform them of account status or changes.
* Review and verify data, such as age, name, address, and principal sum and value of property on insurance applications and policies.
* Examine letters from policyholders or agents, original insurance applications, and other company documents to determine if changes are needed and effects of changes.
* Modify, update, and process existing policies and claims to reflect any change in beneficiary, amount of coverage, or type of insurance.
* Transcribe data to worksheets and enter data into computer for use in preparing documents and adjusting accounts.
* Organize and work with detailed office or warehouse records, maintaining files for each policyholder, including policies that are to be reinstated or cancelled.
* Notify insurance agent and accounting department of policy cancellation.
* Process, prepare, and submit business or government forms, such as submitting applications for coverage to insurance carriers.
* Interview clients and take their calls to provide customer service and obtain information on claims.

 Work Activities

* Interacting With Computers
* Obtaining Information
* Processing Information
* Communicating with Persons Outside Organization
* Communicating with Supervisors and Peers
* Documenting/Recording Information
* Evaluating Information to Determine Compliance with Standards
* Establishing and Maintaining Interpersonal Relationships
* Making Decisions and Solving Problems
* Organizing, Planning, and Prioritizing Work

 Detailed Work Activities

* Answer telephones to direct calls or provide information.
* Calculate financial data.
* Enter information into databases or software programs.
* Interview employees, customers, or others to collect information.
* Maintain operational records.
* Obtain personal or financial information about customers or applicants.
* Prepare business correspondence.
* Provide information to coworkers.
* Provide notifications to customers or patrons.
* Review customer insurance information.
* Verify accuracy of financial or transactional data.

 Qualification

### Education and Experience

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| --- | --- |
| **Years of Experience** | 1-5 |
| **Education** | High School/G.E.D |
| **Degree or Formal Training** | Diploma |
| **License, Certificate Or Registration** | Life & Health Insurance License |

 Skills

### Basic Skills

* **Active Listening**

Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.

* **Speaking**

Talking to others to convey information effectively.

* **Reading Comprehension**

Understanding written sentences and paragraphs in work related documents.

* **Critical Thinking**

Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.

* **Writing**

Communicating effectively in writing as appropriate for the needs of the audience.

### Social Skills

* **Service Orientation**

Actively looking for ways to help people.

* **Coordination**

Adjusting actions in relation to others' actions.

* **Social Perceptiveness**

Being aware of others' reactions and understanding why they react as they do.

* **Negotiation**

Bringing others together and trying to reconcile differences.

* **Persuasion**

Persuading others to change their minds or behavior.

### Complex Problem Solving Skills

* **Complex Problem Solving**

Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.

### Resource Management Skills

* **Time Management**

Managing one's own time.

### Desktop Computer Skills

* **Databases**

Using a computer application to manage large amounts of information, including creating and editing simple databases, inputting data, retrieving specific records, and creating reports to communicate the information.

* **Internet**

Using a computer application to create, manipulate, edit, and show virtual slide presentations.

* **Navigation**

Using scroll bars, a mouse, and dialog boxes to work within the computer's operating system. Being able to access and switch between applications and files of interest.

* **Spreadsheets**

Using a computer application to enter, manipulate, and format text and numerical data; insert, delete, and manipulate cells, rows, and columns; and create and save worksheets, charts, and graphs.