



**Job Description:** Administrative Assistant – Account Manager

**Reports to:** Agency Administrator

**FLSA Status:** Non-Exempt

### **Position Summary**

The Administrative Assistant provides excellent customer service and administrative support to KMi leadership, staff and the clients and is integral to supporting, responding, processing and monitoring all aspects of client's insurance information needs, application and renewal processes, and maintaining client files. In addition to maintaining our vision by adhering to our values and guiding principles, this position must provide the highest level of service to our clients and demonstrate a client-centric attitude and foster the agency culture.

### **Essential Functions**

#### *Agency Support*

- Provide a broad range of skillful administrative and clerical duties to support all agency producers for all lines of coverage
- Assist in the development of insurance quotes and benefit comparison documents for Medical/Dental/Vision/Life/Disability for potential and existing clients as directed
- Review, evaluate and categorize incoming documents by verifying information for accuracy and completeness
- Prepare requests for proposal (RFP's) and client reports
- Competently prepare documents, policy information and files for additional handling or distribution
- Schedule client appointments and inform clients of all required documentation
- Organize and prioritize large volumes of information, emails and calls
- Maintain advanced technical aptitude with computers, software applications, MS Office suite and mutli-line phone systems

#### *Customer Service*

- Provide a professional level of customer service to clients, insurance providers and other agency partners, responding effectively and promptly to all inquiries

- Provide on-going client service to owners/administrators of designated employer groups regarding benefits, claims, renewals, forms, and payments; collect renewal information, participate in renewal strategy meetings, respond to inquiries and support individual, Medicare, life, LTC and DI sales
- Process outgoing insurance applications & incoming carrier renewals, ensuring completeness, within 24 hours of receiving in agency
- Monitor insurance applications daily and throughout the underwriting process to ensure a smooth application process
- Develop a strong working relationship with insurance carriers; learn and understand specific underwriting guidelines to fit client needs for all lines of coverage offered in agency
- Cross-sell agency policy offerings and refer to appropriate Producer
- Maintain and organize client records and files in accordance with agency Knowledge Base (KB)
- Develop systems, forms and other documents as needed to increase efficiencies
- Grow in industry and position knowledge by participating in educational opportunities and obtaining certifications/ licenses
- Serve in the front desk position as needed and directed

#### *Other Duties*

- Attend, participate and be present in staff meetings
- Participate in agency marketing decisions as directed
- Other duties as assigned

#### **Essential Competencies**

- Professional appearance and friendly, approachable demeanor
- Above average communication skills both verbally and in writing
- Self-motivated, flexible and able to function effectively in a fast-paced, data and deadline-driven environment
- Effective organizational skills in time-management and with electronic and paper records
- Ability to build a strong rapport with vendors, colleagues and clients
- Exercise critical thinking, problem solving, sound judgment, resourcefulness and proactivity
- Perform duties with precision and accuracy
- Always exhibit tactful and direct communication
- Work independently and as a member of the team

- Always maintain strict confidentiality, both in and out of the workplace

**Qualifications**

- Bachelor's degree in a related field and one to two (1-2) years in a similar position, or an equivalent combination of education and experience
- History of effective support to clients in a similarly complex industry
- Possess current life and disability license or ability to obtain within first six months of employment
- Able to work outside normal business hours on occasion to meet business deadlines

**EEO Statement**

Kristin Manwaring Insurance is an equal opportunity employer without discrimination because of age, sex, color, national origin, marital status, veteran status, sexual orientation or presence of a disability. Pursuant to the Americans with Disabilities Act, Kristin Manwaring Insurance will make reasonable accommodation of working conditions or methods in order to perform the duties of the position.

**Other Duties**

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

**Signatures**

I have read, understand and am able to perform the essential job functions with or without accommodation.

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Employee Signature

Date

## Administrative Assistant - Account Manager

### PHYSICAL REQUIREMENTS AND POTENTIAL HAZARDS

The following identifies the physical demands and potential hazards typically encountered by this position. The information is necessary in part to ensure compliance with the Americans with Disabilities Act and the OSHA Blood borne Pathogens Standards. These can reasonably be anticipated in the normal and customary performance of the essential functions of your work.

**NA:** Not applicable, not required of this position.

**NE:** Requirement is present but is not essential to the position.

**O:** Occasional, up to 33 percent of the time and essential to the position. (For example, a lifeguard swims only occasionally, but it is essential that a lifeguard be able to swim.)

**F:** Frequent, 34-66 percent of the time.

**C:** Continuous, over 66 percent of the time.

	NA	NE	O	F	C
Sitting					X
Walking			X		
Standing			X		
Running		X			
Bending or twisting			X		
Squatting or kneeling			X		
Reaching above shoulder level		X			
Climbing (e.g. ladders)		X			
Driving cars, light duty trucks			X		
Driving heavy duty vehicles	X				
Repetitive motion of hands/fingers					X
Grasping with hand, gripping					X

	NA	NE	O	F	C
Lifting/carrying 10-25 pounds			X		
Lifting/carrying 26-50 pounds			X		
Lifting/carrying more than 50 pounds		X			
Pushing/Pulling		X			
Using Foot Controls		X			
Work in/exposure to inclement weather	X				
Work in/exposure to cold water	X				
Exposure to dust, chemicals or fumes	X				
Work/live in remote field sites	X				
Use of hazardous equipment (e.g. guns, chainsaws, explosives)	X				
Swimming, scuba diving	X				
Work at heights (e.g. towers, poles)	X				
Exposure to infection, germs or contagious diseases	X				
Exposure to blood, body fluid, or potentially contaminated materials	X				
Exposure to needles or sharp implements	X				
Use of hot equipment (e.g., ovens)		X			
Exposure to electrical current		X			
Seeing objects at a distance		X			
Seeing objects peripherally		X			
Seeing close work (e.g., typed print)					X
Distinguishing colors		X			
Hearing conversations or sounds					X

	NA	NE	O	F	C
Hearing via radio or telephone					X
Communicating through speech					X
Communicating by writing/reading					X
Distinguishing odors by smell	X				
Distinguishing tastes	X				
Exposure to wild/dangerous animals	X				
Exposure to insect bites or stings	X				
Work/travel in boat/small aircraft	X				
Exposure to aggressive/angry people			X		
Restraining/grappling with people	X				
Other: High volume of client contact					X
Other:					

**Items checked above must be consistent with tasks listed.**

I have read and understand the physical requirements and potential hazards of this position and am able to perform the physical requirements as stated above with or without reasonable accommodation.

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Employee Signature

Date