



POSITION: Commercial Insurance Specialist
DEPARTMENT: Commercial Insurance Business Unit
WORK SCHEDULE: 8:00 AM – 5:00 PM Monday through Friday
REPORTS TO: Marci Kuhlman, CIC – Commercial Insurance Team Leader

Who we are: At Henriott Group, Inc. our dedication lies in fulfilling our mission, “providing our clients customized, innovative and cost-effective products and services to reduce risk”. We achieve this by engaging in open conversations with our clients to understand their needs, pinpoint necessary adjustments and identify gaps. Then, and only then, are we able to offer a tailored solution to improve the position of those who partner with us. Our solutions range from, but are not limited to, insurance products, Medicare & individual health, and risk management.

Objectives: We are seeking team-driven, experienced individuals who possess commercial insurance product knowledge and technical expertise. The ideal candidate will have a strong background in commercial insurance, excellent communication skills, and a proven track record in managing client relationships. As a Commercial Insurance Specialist, you will be responsible for maintaining our portfolio of clients by providing exceptional customer service through organized task management. This position requires some degree of independence. This individual will act as the day-to-day client contact to assigned clients as well as work on renewal business.

Broad responsibilities in this role include, but are not limited to:

- Provide prompt, accurate, courteous service to clients and team members.
- Grow and develop talents and insurance knowledge to the highest level possible.
- Provide a high level of support in obtaining, maintaining, expanding, and servicing commercial accounts.
- Organized and timely task management are essential.

Specific responsibilities of this role may include, but are not limited to:

- Service assigned commercial lines accounts.
- Work within assigned timeframes and workflows.
- Prepare company submissions for remarketing renewals as needed within the department.
- Initiate, screen and prepare endorsement requests.
- Prepare and process cancellation requests.
- Prepare and process all requests for certificates of insurance as required within 24 hours of request.
- Review all applications, policies, endorsements, and audits for accuracy.
- Setup and prepare new account files per agency procedures.
- Manage any unpaid audits and request appropriate actions be made according to agency collections procedure.
- Prepare summaries of insurance when required.
- Prepare ID cards, evidence of property, certificates, binders, and/or obtain underwriter approval on manuscript endorsements.
- Deliver policies, and related documents to insureds as needed. (via web, InsurLink, or email)
- Keep current on rates, forms, and coverage changes.



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- Participate in seminars and classes for skill and knowledge development.
- Maintain all client activity in the agency's core management system (Worksmart/AMS360)
- Review insurance policies to identify and eliminate gaps in coverage.
- Prioritize workload and/or request for assistance as required.
- Assist other agency departments in securing and/or providing information necessary to issue appropriate policies in their department for which we have a mutual client.
- Communicate with clients to discuss and handle their insurance needs via phone/email/text.
- Work with Claims Advocate during the claims process as needed.
- Assist with scheduling insured meetings with account executive and business advisor.
- Listen for cross selling and account rounding opportunities.

Requirements:

- Commitment to engage and participate in a culture of collaboration, agility, energy, and innovation
- Property and Casualty license for the State of Indiana (can be obtained post hire)
- Strong desire to increase knowledge and expertise in the commercial space through certifications
- Excellent communication skills
- High level of detail-oriented / task management skills
- Strong customer service skills
- Forward-thinking attitude and adaptability to continual improvement of process and workflows
- Strong organization and time-management skills necessary to manage large and varied projects simultaneously
- Self-motivated and ability to self-manage
- Problem solving skills
- Strong communication and interpersonal skills
- High degree of professionalism and integrity
- Ability to work with all levels and disciplines within a client's organization
- Strong listening skills
- Ability to work as a team and open to self-improvement
- Experience with Microsoft applications
- Experience with Vertafore products is a plus (AMS360 & WorkSmart)

If successful, you will...

Work with and become a part of a talented, collaborative team who make it their mission to bring "*certainty in an uncertain world*".

Henriott Group, Inc. is an equal opportunity employer. We encourage candidates from all backgrounds to apply.



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