



Department: SelectSolutions
Position: Assistant
Reporting to: Amanda Kuiper

Objective: To assist account managers and producers in clerical functions related to account servicing.

Responsibilities include, but are not limited to:

- Endorsement processing of agency bill and direct bill policies.
- Update and prepare statement of values, as necessary.
- Prepare off risk letters and email to customer.
- Monitor the info email box and fax box and distribute to appropriate account manager.
- Review conflict screen.
- Order MVR's for accounts with fewer than 10 drivers.
- Invoicing.
- Scanning duties.
- Photocopying and faxing as needed.
- Answer main SelectSolutions phone line and telephone backup for CCM's & AM's.
- Add client notes after conversations with clients/carrier.
- Send copy of audits to clients and bill them as needed.
- Answer billing questions for account management staff.
- Review policy checklist and update the accounts/policies accordingly.
- Prepare and mail new client welcome letters.
- Review, distribute, attach client documents
- Send experience mod notifications to clients
- Special Projects as assigned.

Qualifications:

- Ability to apply basic administrative skills to perform standardized duties (e.g. to create memos, reports, spreadsheets, etc.)
- Knowledge of administrative procedures and software application (such as Microsoft office Word, Excel, PowerPoint, etc.)
- Effective organizational, interpersonal, and communication skills require to help routine problems, answer general questions, and know when to escalate more complex issues.
- Ability to exercise judgment to shift priorities and organize tasks simultaneously.
- Use proper grammar, spelling, and punctuation when reviewing and/or editing documents for accuracy and completeness.



The candidate should also be:

- Analytical
- Take initiative
- Be motivated
- Committed
- Driving for results
- Collaborative and work well in team environment
- Solid in communication skills, verbal and written
- Flexible
- Be organized
- Have customer service expertise

Education: College degree and administrative experience desirable

Employee Signature

Date