

## Underwriting Account Specialist I

### **POSITION SUMMARY:**

The Underwriting Account Specialist I will support the underwriting team by learning and executing entry-level functions. This position involves mastering various systems and procedures, developing strong clerical and technical skills, and contributing to a collaborative team environment. The ideal candidate will build foundational knowledge of insurance as it relates to underwriting, assist in processing tasks, and proactively seek continuous learning opportunities. This position requires a positive approach to work, focusing on accuracy, efficiency, and professional growth.

\*This role supports all underwriting with an immediate focus on Personal Lines.

### **Principal Accountabilities:**

#### **1. Planning and Delivery:**

- Learn the fundamental navigation and processing of entry-level responsibilities from internal and external systems.
- Develop and apply comprehensive knowledge of systems and production procedures.
- Demonstrate strong clerical and technical skills to ensure accuracy and efficiency in our operating procedures while utilizing multiple systems.
- Complete individual tasks in a timely and accurate manner while contributing to a team environment by accomplishing additional job-related responsibilities.
- Become familiar with basic insurance terminology, coverages, and guidelines through training, team and management interaction, course training, and other resources as it relates to underwriting support functions.
- Responsible for daily retrieval, distribution, and processing assistance of reports and workload.
- Be familiar with specific training manuals and gain an understanding of certain processes.
- Work with teammates to quality check own work to help identify training progression.
- File/scan all proof of mailing receipts.
- Learn legal process procedures, including printed, automated, and typed processes along with mailing and documentation procedures.
- Set up internal renewal changes and quoting opportunities upon direction from Operations manager through training.

#### **2. Business Insight and Analytics:**

- Be observant and inquisitive towards onboarding training and resources to identify areas of improvement (through automation, manual/template updates, etc.).

- Begin time-studies of responsibilities with the support and guidance from teammates to assist with process improvements.
- Work with teammates to update self-identified onboarding template and training manual improvements.

### **3. Communication and Relationship Building:**

- Develop relationships with team members to facilitate learning primary roles and responsibilities of the position.
- Establish introductions with other departments as it relates to the role.
- Through exposure to the team and management, the objective is to learn about the goals and direction of the business.
- Begin to connect with agents for follow-up processes and assist with customer service inquiries, determining information to solicit for call referrals.

### **4. Leadership:**

- Be trained in all systems and processes.
- Learn insurance knowledge through mentoring and relevant courses.
- Exhibit a growth and continual learning mindset, including learning new skills and knowledge relevant to the role.
- Support the growth and development of peers by sharing knowledge and best practices.
- Demonstrate an inclusive approach in all interactions, fostering a collaborative team environment.
- Encourage and implement innovative ideas to improve team performance and efficiency.
- Take initiative in addressing challenges and driving continuous improvement within the department.

### **Job Requirements:**

#### **Experience:**

- Prior experience in a clerical or technical role within insurance operations is preferred but not required.

#### **Education:**

- Bachelor's degree preferred but not required.
- Further education/experience in insurance-related fields is an advantage.

#### **Skills:**

- Strong clerical and technical skills.

- Proficiency in multiple operating systems and rating manuals.
- Excellent communication and interpersonal skills.
- Ability to prioritize tasks and meet deadlines.
- Analytical and problem-solving skills.