

Underwriting Client Specialist I

POSITION SUMMARY:

The Underwriting Client Specialist I plays a pivotal role in supporting entry-level underwriting responsibilities by facilitating communication between clients and underwriters, evaluating risks, and ensuring timely and accurate review of policy transactions. This position requires a proactive positive individual with strong communication skills, excellent interpersonal expertise, and a commitment to delivering exceptional service to clients and stakeholders. The ideal candidate will build foundational knowledge of insurance as it relates to underwriting, assist in processing tasks as needed, build client relationships, and proactively seek continuous learning opportunities.

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

Principal Accountabilities:

1. Planning and Delivery:

- Evaluate and analyze insurance applications to determine eligibility and coverage.
- Process underwriting tasks efficiently, ensuring adherence to deadlines and quality standards.
- Maintain up-to-date knowledge of underwriting guidelines, company policies, and industry regulations.
- 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.
- Develop and apply comprehensive knowledge of systems and production procedures.
- Learn the fundamental navigation and processing of entry-level responsibilities from internal and external systems.
- Review Umbrellas to determine underwriting acceptability.

2. Business Insight and Analytics:

- Use data-driven system analysis tools to determine risks align with underwriting and organizational goals.
- Monitor and report on internal-facing department responsibilities.
- Identify agency trends and opportunities for improving underwriting processes and outcomes.

3. Communication and Relationship Building:

- Serve as the primary liaison between agents, underwriters, and other departments within the company ensuring clear and effective communication.

- Build and maintain strong relationships with clients and internal teams to foster trust and collaboration.
- Through exposure to the team and management, the objective is to learn about the goals and direction of the business.
- Provide timely responses to inquiries, ensuring a high level of client satisfaction.

4. Leadership:

- Actively contribute to a positive team environment by sharing knowledge and supporting peers.
- Learn insurance knowledge through mentoring and relevant courses.
- Demonstrate a commitment to continuous learning and skill development.
- Uphold the company's mission and values by conducting oneself with integrity and professionalism.

Job Requirements:**Experience:**

- Prior experience in a clerical or technical role within insurance operations is preferred but not required.
- Familiarity with property and casualty insurance products preferred.
- Prior experience in customer service role.

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.
- Exceptional client support abilities.
- Ability to prioritize tasks and meet deadlines.
- Analytical and problem-solving skills.