

2022 NEW BUSINESS COORDINATOR JOB DESCRIPTION

Job Title: New Business Coordinator
Supervisor: Vice President
Start Date: ASAP
Salary: TBD
Schedule: 8 a.m. – 5 p.m. Monday through Friday, with OT as approved.
In the event of a catastrophe such as a hurricane, longer hours should be expected.

COMPANY SUMMARY

Heidrick & Co. Insurance company focuses on the property and casualty insurance needs of companies and individuals on Sanibel, Captiva and the barrier islands of Lee County. The staff works as a coordinated team, assisting in other areas of the company when needed.

We are not a sales organization, but rather an educational one. We pride ourselves on understanding and thoroughly explaining the potential risks facing home and condominium unit owners and the insurance products available to protect their property and other assets.

At Heidrick & Co. Insurance, we place a priority on a high level of client service. The ideal candidate will be required to operate in a client-centric fashion.

POSITION OUTLINE

The New Business Coordinator is a newly created position and does not require insurance industry experience. This position is ideal for someone with a background in hospitality industry and/or a busy professional office setting.

ESSENTIAL DUTIES AND RESPONSIBILITIES

This individual will work primarily with prospective clients to collect the information needed to accurately quote insurance for homes, condominium units, autos, watercraft and other lines of coverage. The candidate will:

- Answer incoming calls and respond to incoming email inquiries from prospective clients, realtors and other referral sources to collect accurate contact and risk information.
- Schedule in-office appointments for those who prefer to meet in person and assist walk-ins looking for coverage.
- Advise which inspection and municipal reports are required for quoting and coordinate the scheduling of these inspections when needed.
- Create and maintain accurate client information into our agency management database.
- Search county property appraiser websites to locate details related to home and condominium unit purchases.
- Take photos of homes when required by insurance company underwriters.
- Support agents with any additional information or documentation needed for accurate quoting and binding.
- Provide back-up to Client Service team with answering incoming phone calls and addressing office visitor requests.
- Assist staff with correspondence and policy delivery.
- Track new business successes, providing monthly reports to the Management team.
- Other duties as assigned.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

Professional office experience in which computers and commercial phone systems were utilized is required. Some college experience is helpful, but not required.

Communication Skills:

- Strong oral and written communication skills required
- Highly effective listening skills

Reasoning Ability:

- Strong, independent problem-solving skills
- Ability to remain organized and detail-oriented, even with frequent interruption

Computer Skills:

- Must be highly skilled at Microsoft Office products, particularly Word, Outlook, Excel and Adobe DC.
- Proficient with Google Chrome and other internet browsers
- Minimum typing speed of 50 wpm
- Ability to scan, attach and upload files/photos
- Ability to quickly learn Windows-based agency management system

PHYSICAL DEMANDS

The New Business Coordinator will be required to sit for long periods of time and spend much time on the phone. Additionally, he/she will utilize a computer with dual screens the majority of the day.

The ability to stoop and bend to access client files is necessary.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

WORK ENVIRONMENT

Heidrick & Co. Insurance is a very busy office environment. The New Business Coordinator will be required to manage a number of projects simultaneously. He/she may be interrupted frequently to meet the needs and requests of clients, staff, insurance carriers and others. Excellent organizational and time-management skills will be imperative to complete required tasks successfully.