



Junior New Business Allotment Specialist

SUMMARY:

Provides support to the new business department by handling incoming calls, various reports, processing of u/w requirements, emails and correspondence. Responsible for allotment and payroll deduction workflow processes. Serves as knowledgeable resource for allotment and payroll deduction business.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Handle incoming telephone calls and emails from agents, policy owners and personnel in other departments to include general questions on allotment and payroll deduction business.
- Accepts primary responsibility for the processing and accurate completion of allotment and payroll deduction reports and the completion of such within specific deadlines.
- Supports a positive, high performing work environment where team members are driven and motivated. Takes an active role by providing high-energy performance.
- Provides an excellent example to others in terms of responsibility and professionalism.
- Behaves professionally in a courteous and friendly manner and provides exceptional customer service.
- Assists in reviewing quality of work ensuring that allotment and payroll reports as well as other daily tasks are completed with a high degree of accuracy and works with team leadership to address areas of concern.
- Works as a member of special or ongoing projects that are important to area/process improvements.
- Maintains active and open communication with department leadership about trends, concerns, and opportunities.
- Participates in discussions on allotment and payroll deduction business with cross-functional teams by providing insight, information, and researches material when needed.
- Continues expanding own knowledge of company products, procedures, and processes.
- Supports a professional work environment ensuring that all employees are following Company guidelines.
- Cross-train with other Customer Service Representatives to be able to work various tasks in the absence of coworkers.
- Conduct Company business in accordance with all applicable laws, regulations and contractual obligations. Behave ethically and with integrity and always follow the principles of the Compliance Program when making business decisions. Compliance with this program is a condition of employment for every American-Amicable employee.

EDUCATION, WORK EXPERIENCE and TRAINING REQUIREMENTS:

- Must have general understanding of the allotment and payroll process.
- High school diploma or general education degree (GED).
- Ability to type 40 wpm with 90% accuracy
- Superb customer service experience with a proven record of solid performance.
- Must have a strong understanding of team and department procedures and processes.

REQUIREMENTS: 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.

- A friendly, positive, learning-oriented attitude.
- Strong communication, interpretative and organization skills
- Must have strong problem solving and analytical skills
- Able to work under pressure and transition between tasks without workflow disruptions or errors
- Strong ability to deal effectively with complex tasks with little to no supervision
- Solid knowledge of Company systems, websites, processes, and procedures

WORKING CONDITIONS, PHYSICAL and MENTAL REQUIREMENTS: The working conditions, physical and mental requirements described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Work is sedentary in nature and is performed in a traditional office environment with cubicles. Typically, the incumbent will sit comfortably while performing the work, with some walking, standing, bending and carrying of light items, such as papers, books, and files. Other physical demands in performing the essential functions of this position include: digital dexterity, hearing, seeing, and talking. Mental requirements include, but are not limited to, the ability to concentrate, take initiative, cope with stress, adapt, and stay alert in a business environment.

Note: This job description reflects a summary of the job and does not prescribe or restrict the responsibilities that may be assigned. This job description is subject to change at any time.