

# HMS Insurance Associates, Inc. Commercial Lines Department

## **Job Description**

**Title:** Education, Training and Quality Assurance Manager

**Reports to:** Vice President Education, Training, Quality Assurance & Claims

### **Description of Responsibilities:**

Working with the VP of Education, Training, Quality Assurance & Claims, the Education, Training and Quality Assurance Manager will be responsible for helping HMS achieve its quality assurance and training objectives by educating, training, and developing the commercial lines staff in addition to auditing/reviewing files for accuracy.

### **Key Duties & Accountabilities:**

**Coverage Analysis** – Assist teams with coverage analysis and compliance issues:

- Review contracts for insurance requirements
- Provide comparisons of policy forms
- Research coverage questions
- Research state insurance laws and ISO/NCCI rules
- Review prospects' current insurance program and suggest improvements.

**Training** – Ensure that staff-members acquire and strengthen the skills necessary to perform the job duties. Skills include the ability to:

- Understand various types of insurance coverage and how exposures are rated
- Navigate and use various computer systems and software
- Accurately request, process, review, and invoice policies, endorsements, and audits
- Accurately complete applications and proposals

**Developing & Mentoring** – Facilitate learning and professional development by providing appropriate technical training, coaching and support. Builds rapport; is approachable, tolerant and patient.

**Auditing** – Review files for accuracy, verifying the data in the agency management system with the policies and proposal, and ensuring that HMS policies and procedures have been followed.

**Leading & Directing** – Creates a climate that motivates and focuses staff members on understanding and meeting or exceeding internal and external customer expectations. Empowers others to share ownership and invites feedback while eliminating roadblocks and focusing on critical objectives.

**Special Projects** – Under the direction of VP Quality Assurance, assist with any special projects as needed.

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### **Qualifications:**

- Maryland State Property & Casualty Producer license
- Six (6) or more years of account management/marketing experience in a sales environment.
- Bachelor's degree, professional designation such as CPCU, CIC, CRM, AU, AAI, ARM or proven insurance-related work experience preferred.
- Superior understanding of insurance principles. Has the functional and technical knowledge and skills to do the job at a high level.
- Strong customer service focus. Is energetic, action oriented and ready to seize an opportunity. Responds with a sense of urgency as required.
- Demonstrated ability to rate property and casualty insurance policies.
- Superior interpersonal skills. The ability to communicate complex information to a wide spectrum of personnel in a clear, concise and well organized manner.
- Solid written and verbal communication skills.
- Exhibits proven leadership skills, with a focus on coaching.
- Strong organizational skills with a proven ability to manage multiple priorities and deliver a timely, accurate work product.
- Detail oriented to ensure accuracy.
- Excellent listening skills.
- Demonstrated problem solving skills to resolve customer service issues.
- Superior ability to navigate various computer systems, and use Microsoft Word and Excel.
- Proven ability to effectively lead a team in a sales environment.