JOB DESCRIPTION

Job Title: Policy Analyst I
Job Grade: 19
FLSA Status: Non-exempt
Department: Information & Technology Services
Reports To: Operations Manager

SUMMARY

Under general supervision of the Operations Manager, this position will be a resourceful problem solver for insurance agencies and brokers conducting business in the state of Texas. Responsibilities require the ability to follow the life cycle of insurance policy filings through policy initiation, changes, renewals, and payments, while using the opportunity to educate customers on regulatory compliance and/or tools for navigating the database through website access.

ESSENTIAL RESPONSIBILITIES

1. Provides database support and technical assistance, primarily to insurance agents via telephone and e-mail. Responds to requests using active listening, asking questions as appropriate, and assisting users in progressive problem solving from initial contact to final resolution.
2. Gathers information from users, analyzes problems, and reports problems. Ensures problems are properly logged, escalated when necessary, and closed out. Analyzes problem records and reports on trends or high impact problems.
3. Gathers data to identify customer needs for use in improving the design, utility, and efficiency of the database.
4. Maintains working knowledge of the database application software, and insurance laws and terminology.
5. Takes on small projects to automate, streamline, and enhance efficient practices.
6. Processes incoming policy documents and performs data entry.
7. Performs policy audits, including review of agent information for accurate entry into the system, including reporting discrepancies to Operations Manager and makes corrections as needed.
8. Assists with user and password re-set on web portal.
9. Assists with new agent registration.
10. Performs other duties as assigned.

MINIMUM QUALIFICATIONS

1. High School Diploma. An equivalent combination of experience and/or education will be considered.
2. One (1) year technical support or customer service experience.

3. Strong technological skills, with ability to navigate multiple company systems or learn new systems.
4. Effective communication, organization, and time management skills to deliver excellent customer service with responsiveness and pro-active solutions.
5. Comfortable working in a call center environment, ensuring good dialogue is conducted with peers, supervisors, and customers.
6. Ability to multi-task and pay attention to detail, with emphasis of working independently and completion of tasks, as assigned.
7. Intermediate or higher proficiency of Microsoft Word and Excel.
8. Demonstrated job stability.

DESIRABLE QUALIFICATIONS

1. Experience with agent/brokers, insurance companies, or other similar industry entity.
2. Knowledge of insurance law and terminology.

Disclaimer

This job description is intended to be representative of the general nature, scope, and level of work performed by an incumbent in this position. It is not intended to be an exhaustive or limiting list of all responsibilities, duties, and skills required of all persons assigned to this position. Management reserves the right to modify this job description at any time.