



## **Account Coordinator Front Desk**

At Dyste Williams, we strive to be a trusted insurance advisor and advocate for our clients. Our experienced professionals are trusted to handle all insurance needs. Many of our seasoned insurance experts have more than 20 years of experience. We're passionate about keeping up with the latest insurance products and benefits and participate in continuing education. Dyste Williams employees adhere to the highest level of integrity which has been recognized throughout the community and the insurance industry. At Dyste Williams you are part of a successful and supportive team that seeks to meet our client's needs.

### **Position Overview**

The Account Coordinator is accountable for delivering high quality and efficient service to both internal and external clients by assisting with the Agency's overall workflow processes. At Dyste Williams you are part of a successful and supportive team that strives to exceed our client's expectations about their insurance.

### **Primary Responsibilities Include:**

#### **Daily**

- Responsible for answering and routing incoming phone calls
- Manage the group voicemail – review and route messages
- Manage the main email box – review and route emails
- Mail - sort and scan
- Pull documents from the various carrier websites and attached/scan
- Greets clients & offers beverages (when back in the office)
- Reserves conference rooms as necessary (when back in the office)
- Claims-update claim payments, create follow up activities
- Misc. tasks – assigned by management and/or assisting a team member in the various departments

#### **Monthly**

- Maintain and order supplies
- Adding documents & templates to DocuSign as needed
- Manages Kitchen Cleaning Calendar (when back in the office)
- Manages Marketing Calendar – Registers for events as needed, tracks booth supplies, attendees, etc.
- Restocks DW Supplies as needed – folders, letterhead, envelopes, etc.
- Orders thank you gifts, flowers, & swag as needed
- Data Entry Projects
- Facilitates Vendor Deliveries as needed
- Order and assemble exhibit booth materials for conferences and sponsorships
- Provide input and peer review new Dyste marketing materials
- Serve as organizer and provide technical support for GoToWebinar live and recorded client presentations; run applicable reports
- Peer review Dyste whitepapers
- Execute monthly Employee Benefits Client Education Campaign (Zywave) to all benefit client contacts; run usage reports

- Order and assemble client appreciation gifts and prospect drop-off items
- Help assemble hard mailings (acquisitions, advisor campaigns)
- Manage marketing supply closet

**Job Specific & Technical Skills & Competencies:**

- Proficient in basic computing skills including Microsoft Office Suite
- Professionalism – Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration regardless of their status or position; accepts responsibility for own actions; follows through on commitments
- Quality – Demonstrates accuracy and thoroughness; looks for ways to improve and promote quality; applies feedback to improve performance; monitors own work to ensure quality
- Ability to meet deadlines and coordinate complex tasks related to client interactions and policy management
- College degree preferred but not required