

## **JOB DESCRIPTION**

**JOB TITLE:** Executive Claims Consultant  
**REPORT TO:** Merideth Wieland  
**LOCATION:** Bay Area (San Francisco, Walnut Creek)

The claims consultant is responsible for servicing and maintaining the claims consulting services according to the service agreement sold to the client. The claims consultant also plays a key role in the sales and marketing of their service. The claims consultant is an advocate for the client and must provide timely service to all commitments agreed to in the service agreement. In all aspects of the position, the consultant must take an aggressive and proactive approach in their claims monitoring role. Follow up with the carriers, adjusters and the clients are of paramount importance.

### **Responsibilities Include:**

- Proactively provide services according to the service agreement sold to the individual client, meet timeline commitments, including but not limited to claims consulting, ex-mod calculations, claim review meetings, sales presentations, etc.
- Educate and answer client questions and act as a resource to client for any claims issues.
- Active member of the claims consultant team, sharing knowledge and information. Provide back up to all other consultants as necessary.
- Respond to all communication (phone, fax, email) from clients (i.e., end users), HIB producers and account managers within one day.
- Update voicemail greeting message on a daily basis.
- Accompany HIB producers on client or prospect meetings as appropriate.
- Responsible for preparing and delivering sales presentation for claims consulting services.
- Consultant's manager will assign clients to consultant, with the majority generated from the office in which consultant will be domiciled.
- Prepare Service Agreement once sold; provide client with the client version of the agreement and the producer with the producer version.
- Adhere to pricing guidelines and obtain manager approval for any deviation on contract pricing.
- Make introductory telephone contact with the client within 1 business day.
- Prepare and send invoice request to accounting to prepare invoice.
- If contract is client pay, track aged receivables and follow-up on outstanding payments...
- Forty five (45) days prior to renewal, contact HIB producer to determine renewal interest.
- Thirty (30) days prior to renewal provide renewal price estimate.
- Prepare the renewal agreement and set up the account, within 30 days after renewal.

- Determine appropriate claims to be tracked for client, based on the contract and service agreement. Create appropriate activities in Applied for tracking.
- Communicate with insurance company to obtain current status and reserve levels.
- Prepare claims report for presentation to the client, as stipulated in contract.
- Conduct telephonic or on-site claim reviews according to the services sold.
- Conduct experience modification projections, MedCor implementation and billing, MPN assistance and any other appropriate service per service agreement.
- Special projects as assigned

**Experience/Education:**

- High School diploma or equivalent.
- Knowledge and experience in claims adjusting for commercial lines (workers' compensation and/or property & casualty) required.
- Strong customer service skills required.
- Knowledge of multiple state and federal claim laws, desirable.
- Computer skills, including Word and Excel.
- Sales skills desirable.
- Strong Communication skills – written and oral.
- Basic insurance knowledge of how the workers' compensation product is priced, serviced, etc., desirable.

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Employee Signature

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Date