

Title: Director of New Business Operations or New Business Operations Manager

Location: La Jolla/UTC

Summary:

Successful Life Insurance Brokerage Agency, based in San Diego, seeks an experienced, organized and highly motivated individual with Life Insurance general agency or carrier New Business/Underwriting operations management experience. Candidate must possess efficiency in management, processes and client services with the ability to lead the New Business Operations team. Company culture is high volume, quick turn around and customer centric.

Duties and Responsibilities:

- Directly manages employees and carries out manager responsibilities in accordance with the organization's policies and applicable laws.
- Provide guidance and direction to New Business department. Responsible for shifting resources or work to accommodate staffing and production.
- Develop, coordinate, and enforce systems, policies, procedures, and productivity standards.
- Create, modify and implement department workflow and processes including changes to Agency Management System. Consistently review processes and systems to look for improvements and efficiencies.
- Maintain quality service by enforcing quality and customer service standards, analyzing and resolving quality and customer service problems, and implementing improvements.
- Maintain case load to stay current on processing.
- Liaison to carriers and vendors both at micro and macro level depending on need (Individual complex cases, systems issues, workflow, carrier changes, and company direction).
- Primary New Business liaison with Executive Staff and internal departments.
- Anticipate potential problems and concerns and provide solutions to prevent or resolve.
- Provide staff, executive, department, carrier and production reports.
- Assist with HR functions within department to include: Interview and training; plan, assign and direct work; conduct performance appraisals; reward and discipline employees; address complaints and resolve problems.

Desired Skills/Experience:

- Minimum of 3 years life insurance New Business/Underwriting management experience in a brokerage general agency or life insurance carrier.
- Extensive knowledge of case management processing, carrier underwriting, underwriting requirements, new business processes and carrier forms in a brokerage general agency environment.
- Demonstrated ability to effectively work and communicate with agents, carriers and internal customers resulting in excellent customer service.

- Proven ability of problem analysis and resolution at both a strategic and processing level.
- Demonstrated experience in workflow improvement and efficiency.
- Strong knowledge of life insurance products and illustrations.
- Excellent technical skills to handle a paperless environment and navigate carrier & vendor websites for information.
- Ability to complete tasks timely, efficiently and with a high degree of accuracy and urgency.
- Demonstrated experience in handling confidential and sensitive information.
- Detail oriented and proven ability to multi-task.
- Ability to work in a cross-functional team environment.
- Understanding of reinsurance markets, carrier retention and capacity limits.
- Experience utilizing agency management system. Experience with iPipeline Agency Integrator a plus.

To apply, please submit your Resume to include a Cover Letter with salary expectation to careers@thepg.com.