KAFL INSURANCE RESOURCES

Job Title: Case Manager
Department: Brokerage Marketing Team
Reports to: **New Business Manager**

Role objectives:

We are a national multi-line Brokerage Agency that provides dedicated support and innovative resources to those who provide financial solutions to families and businesses. Our Brokerage Team is motivated, forward-thinking individuals who develops advisor relationships and designs creative product solutions with advanced marketing concepts. We work as a team and we take pride and ownership of being a trusted partner to our advisors. The Case Manager works alongside our sales team and our advisors to ensure a successful and efficient new business process.

Responsibilities:

- Be the Liaison between our advisors and carriers to ensure an efficient and easy process.
- Monitor case progress, track down requirements, and provide ongoing status updates.
- Review application information, including medical history, to identify any issues that could present a problem -if necessary, you'll research and present alternative solutions
- Continuously look for ways to expedite and improve our process and services.
- Maintain positive relationships with agents and underwriters – because good rapport creates a better experience for them and you.
- Use superior negotiation skills to influence successful outcomes.

Skills:

- **Strong Organizational Skills**: Organization and persistence are valuable assets. Recognizes what needs to be done in order to achieve identified goals. Structures time and prioritizes to meet objectives. Willing and eager to learn.
- **Teamwork and Collaboration**: Contributes to the efforts of the organization as a team player. Works with KAFL Individual Sales and Employee Benefit teams to identify and capitalize on opportunities.
- **Strong Analytical Skills:** Ability to evaluate the needs of each client to determine and effectively communicate complex concepts. Comfortable with technology.
- **Strong Interpersonal and Communication Skills**
- **Business Acumen:** Has a sense of ownership, and drives positive results. Understands when to leverage resources.
- **Adaptability:** Ability to adapt to a changing environment and systems. Able to prioritize and work well under pressure.
- **Learning:** Passionate about learning and has a growth mindset.

Qualifications:

- Bachelor's degree in a business-related field, plus 2 years experience, or equivalent combination of education and experience.
- Must be proficient in Microsoft Excel & Word
- General understanding of the financial services industry and illustration systems

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Our Core values we live by:

- **Integrity** - Doing right by our advisors and clients regardless of revenue outcomes to our organization is of the utmost importance to our team.
- **Respect** - Models respect for others while encouraging a culture of listening.
- **Accountability** - Self-motivated; We would like the candidate to commit to the activity it takes to become a successful sales and marketing professional. This will include independent learning outside of normal business hours as well as a commitment to getting the job done when high-priority opportunities present themselves.
- **Innovation** - new ideas are welcome on our team. We look to all members to bring improvement suggestions to our process and service models.
- **Collaboration** - The ability to work with a team includes the ability to develop relationships that promote open communication. The team will expect the ideal candidate to have fun, work hard and make a joint effort to grow as a unit sharing ownership in challenges and success.