

## JOB DESCRIPTION

<b>Job Title</b>	Operations Assistant	<b>Job Reference No.</b>	
<b>Department</b>	Sales & Strategy	<b>Created / Revised</b>	October 2023
<b>Reports to</b>	Sales/Branch Manager - Antigua	<b>Staff Supervised</b>	0

**Type of position:**       Full-time       Part-time       Contract       Intern

### JOB SUMMARY

The Operations Assistant provides administrative and operational support to the office related to CCI's services. It is expected that these tasks are performed efficiently and accurately, contributing to the smooth operation of the business.

### ACCOUNTABILITIES

- Receive telephone calls from external parties and direct same to internal parties.
- Place telephone calls to external parties in accordance with the established procedure.
- Clarify basic queries from external parties in a customer-focused and customer-friendly manner, referring to appropriate departments when in doubt.
- Meet, greet, and treat walk-in customers or members of the public in keeping with established service standards.
- Receive and sort mail, packages, and related items.
- Assist with the distribution and/or dispatch of mail and/or packages locally, regional, and internationally.
- Handle enquiries, queries, or concerns in entirety, received via telephone, letter, email, website or from walk-in customers.
- Follow up on enrollment issues including outstanding requirements for enrollments.
- Ensure thorough knowledge of the organization's products or services and keep up to date with changes on company products and services.
- Ensure adherence to CCI's service standards and policies.
- Implement conservation strategies as designated by the manager with an aim at increasing retention rates.
- Maintain accurate records of discussions or correspondence with customers.
- Conduct timely, effective premium collection follow-up activity on accounts in varying stages of arrears, following through until collection.
- Create and update logs for tracking/ recording concerns, complaints, queries, and Premiums collected.
- Investigate customers' complaints with relevant units and assist with providing solutions.

#### Administrative duties

- Processing of payments (e.g., utility bills, office stationery, etc.)
- Tracking, requesting, and distribution of marketing collateral for the office.
- Processes daily printing of letters for our Credit Union (CU) partners.
- Sorts letters for CUs to be packaged for delivery.
- Assists clients with FIP Cancellation of Dependents.
- Processes FIP Cancellation of Dependents for members over 26 years old.
- Send FIP Notices Of Cancellation to Members.
- Send correspondence to members regarding a denial of their enrollment application.
- Process and disburse FIP Application COI & COP Amendment Letters to Members.
- Process forms, certificates, and other correspondence for members using GPAS-5 Free Form template.

**Other related duties:**

- Processing of FIP New Business, COP, COI and beneficiary information.
- Handling D&E birth greeting cards and updating records.
- Tracking submissions for campaigns.
- Preparing relevant certificates and payment vouchers for campaigns.
- Designing relevant flyer/poster for campaigns.
- Printing premium due notice letters, packaging, and mailing.

**SKILLS REQUIREMENTS**

- Excellent oral and written communication skills
- Excellent interpersonal communication skills
- Strong organizational skills
- Strong problem solving skills
- Strong time management skills

**EXPERIENCE REQUIREMENTS**

- At least 1 year of experience in a client servicing environment, preferably in the insurance industry.
- Demonstrated ability in the discharge of client servicing principles and practices.

**EDUCATION, KNOWLEDGE, AND CERTIFICATION REQUIREMENTS**

- Five (5) CXC passes, Grades I & II, inclusive of Mathematics & English A (General Proficiency)
- MS Office Suite (Word, Excel, PowerPoint etc.)