

Case Manager Position
January 2010

IntelliQuote Company Profile:

An industry leader in the online life insurance business, IntelliQuote helps consumers purchase affordable life insurance by making the buying process easy and convenient. Through our innovative and intuitive website, we help people search and compare prices and policies from the top life insurance companies (visit our website to see how easy this process is: www.Intelliquote.com). During our twelve year history, we have placed over 100,000 life insurance policies, and hundreds of families each month trust and rely on us to find and place new policies to protect themselves and their families.

IntelliQuote Case Manager Job Profile:

The Case Manager position involves managing up to 250 life insurance cases which includes detailed processing of insurance application forms that are being submitted to underwriting, as well as in and out bound customer service phone calls, correspondence via email, fax or other written methods plus other projects or duties as assigned by manager.

As a licensed life insurance professional (licensing procedures below), you will also be responsible for problem solving, making appropriate changes and recommendations, and working closely with our sales agents to secure paid policies with our customers.

Case Manager Essential Duties:

- Excellent customer service abilities and experience.
- Successfully complete the application interview and verify information with the client via the telephone.
- Ability to effectively make customer service calls to clients through a dialer system (campaign calls) which may include application fulfillment campaign, approved as applied campaign, and various other campaigns.
- Entry of customer data into database.
- Collect vital information, update customers on policy status, and explain discrepancies.
- Handle multiple open and pending applications at one time.
- Process and review all documentation of life insurance cases in a fast-paced environment.
- Be the “go-to” liaison for the application process between all internal and external persons.
- Track and monitor underwriting of insurance policies from application to policy approval.
- Maintain regular contact with clients to inform them of their application status.
- Develop and maintain healthy business relationships with carriers or personnel.
- Apply knowledge to carry out instructions furnished in written or oral form.
- Knowledge of email & browsers Contact Management systems and Database software.
- Other duties may be assigned.

Education and/or Experience & Licenses

- 2+ years of college and high school diploma or general education degree (GED).
- 2+ years related customer service experience and/or training.
- California Life Insurance License. – To comply with state life insurance regulations, this position requires that you have an existing CA life insurance license or pass the CA life insurance license exam within 21 days from your date of hire.

If you don't have a CA life insurance license, we will help you get one!

- All study materials will be provided by IntelliQuote and study time can be completed at our office during normal business hours.
- We also pay for all licensing exam and licensing fees.

Job Requirements:

Ability to be self- motivated, work independently, be self-directed and able to conduct business in a resourceful, positive and professional manner.

Able to utilize excellent time management and organizational skills.

Able to communicate effectively (verbally and written) with clients, team members and leadership.

The ideal candidate must possess: Strong Computer Skills with web-based applications, MS Office Products including Word, Outlook and other software programs, customer service skills and have the ability to juggle multiple deadlines while paying close attention to details.

Must be able to type 45+ wpm.

Also must be highly organized, able to process all paperwork in a timely fashion and follow-up with clients as needed.

No criminal conviction history, no current bankruptcy, no current bad credit, no current overdue bills, pending court dates and no collections (our insurance companies have tough standards as to who they will appoint as agents and we'll need to get you appointed with several companies and licensed in up to 49 other states)

Requires the ability to work flexible business hours and on occasion requires overtime during key project deadlines..

Previous experience in insurance, mortgage industry or related skills with strong customer service skills preferred.

Our employees enjoy a fun, casual yet professional work environment.

IntelliQuote: Our Invitation to You:

At IntelliQuote, we're dedicated to our clients, our industry and to you! We offer a stable and solid job with lots of fast-path career advancement opportunities and an opportunity to BUILD A CAREER. Here at IntelliQuote, you'll get to work with and advise all sorts of interesting people as you help them achieve their life insurance needs. If you sincerely enjoy helping people, and like to work at a fast pace with other diverse professionals in a challenging and fun environment, then IntelliQuote offers you a career opportunity.

The IntelliQuote Offer:

- Paid health insurance
- Three weeks of paid time off (PTO) and nine paid holidays earned annually.
- Competitive compensation package.
- In addition to our full range of benefits (medical, dental, and 401k), we also offer a casual dress environment.
- We also provide for all licensing costs upon completing your first full month of employment.

If you think you have what it takes to be an IntelliQuote Case Manager, then apply today!

To be considered today, email your complete resume, along with references, to careers@intelliquote.com