



## Position: Operations Specialist

### About SES

SES Insurance Brokerage Services, Inc. is a leading provider of insurance services for large portfolios of residential real estate. SES currently services over 36,000 properties for fiduciaries, owners and managers through master policies on a nationwide basis. SES has a 28 year history of offering competitive and comprehensive insurance products complimented by unparalleled service and technology platforms for properties held in trust by financial institutions. In early 2014 SES expanded its product offerings and tailored its technology platform to address the evolving insurance needs of Real Estate Investors in the REO to Rental Market.

SES is an energetic and growth-oriented workplace comprised of talented and committed professionals who seek to make a difference at work, at home and in the community. As a result, SES was recently named one of the Top 25 insurance brokers, one of the fastest growing companies in Orange County and Insurance Journal's Best Places to Work in the West.

SES is also proud to be a socially conscious organization, with a goal of being a difference maker in our community. Each SES employee is granted 40 company-paid Community Service hours in addition to multiple company-sponsored Service Projects each year. SES runs a United Way Campaign in which the owners of the company provide a dollar for dollar match.

### Job Summary & Purpose

SES is on a strong growth trajectory, and to support this growth, we are looking for an Operations Specialist to prepare initial documentation for insurance policies and facilitate policy setup in the system. This role will encompass a steady flow and variety of responsibilities. It will be imperative for the candidate to perform in a collaborative environment, have strong organization skills, attention to detail and a sense of urgency.

### Duties and Responsibilities

- Process and prepare daily documents, such as reports and forms as well as deliver them via email or mail to clients in a timely manner.
- Review files, records, and other documents to obtain information to respond to requests.
- Maintain and update filing, mailing, and database systems, either manually or using a computer.
- Complete and mail bills, contracts, policies, invoices, or checks on a daily basis.
- Compute, record, and proofread data and other information, such as records or reports.

- Operate office machines, such as photocopiers and scanners, voice mail systems, and personal computers.
- Open, sort, and route incoming mail, answer correspondence, and prepare outgoing mail.
- Troubleshoot problems involving office equipment, such as computer hardware and printers.
- Answer telephones, direct calls, and take messages in a professional and timely manner.

## Qualifications

### Key Competencies:

- time management skills and the ability to prioritize work
- attention to detail and accuracy
- problem-solving
- adaptability and flexibility
- customer service orientation
- communication skills - verbal and written

### Key Skills:

- Knowledge of standard office principles, procedures, and etiquette.
- Knowledge of the basic capabilities and functions of word and data processing applications software, such as MS Office Word and Excel.
- Knowledge of basic math principles.
- Knowledge of principles of business English, grammar, and punctuation.
- Knowledge of principles of telephone etiquette.
- Skill in using general office equipment such as telephones multi-line telephone system, scanners, copiers, and computers.
- Skill in recording and retrieving general information.
- Skill in communicating effectively with others both orally and in writing.
- Skill in dealing effectively with the general public.
- Ability to establish and maintain effective working relationships with those contacted in the course of work.

### Preferable Skills:

- Knowledge and experience in insurance, especially property and casualty.
- High School diploma or GED and one (1) year of clerical or office experience, or any equivalent combination of training and experience.
- College or university degree.

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