

JOB DESCRIPTION

Operations Associate

Department:	Operations
Reports to:	Operations Manager
Terms:	Full Time, Nonexempt, Fridays Remote
Location:	Rocklin/Remote Hybrid
Salary Range:	\$50,000 – \$65,000

About This Role:

Since 1996, Care West Insurance has been providing workers compensation insurance for a range of businesses throughout California and Nevada. Care West is rated A- (Excellent) by AM Best and is privately owned, domiciled, licensed, and admitted in California.

- As an Operations Associate, you will play a crucial role in supporting various operational functions, with a primary focus on maintaining our CRM (HubSpot) broker database. This position requires meticulous attention to detail, strong organizational skills, and the ability to handle multiple tasks efficiently.

Essential Duties:

- Maintain CRM Database
 - Regularly update and maintain the broker database in HubSpot. Ensure accurate and up-to-date information on brokers, including contact details, licensing, and E&O insurance.
- Maintain Broker Appointment Documentation
 - Gather necessary documents such as broker E&O insurance, license updates, and contract information. Upload relevant data into the CRM system accurately and promptly.
- Portal User Setup
 - Facilitate the setup of portal users for brokers and insureds. Ensure smooth onboarding processes and provide necessary support as needed.
- Presentation Preparation and Shipping
 - Print and assemble board presentation packets as required. Ensure timely delivery through mail or other designated channels.
 - Prepare and package promotional items (swag) for broker offices. Handle the mailing process efficiently to ensure timely delivery.
- Convention Support
 - Assist with convention reservations, correspondence, and booth preparation, including shipping logistics. Coordinate logistics to ensure smooth participation in events and conventions.

- Marketing Calendar Maintenance
 - Maintain the marketing calendar for events and conventions
 - Coordinate with marketing team to ensure alignment with promotional activities
- Association/Membership Renewals
 - Assist in ensuring timely renewals of association memberships and subscriptions
 - Track renewal deadlines and facilitate the renewal process as necessary
- Facilities Assistance
 - Organizing vendor contacts and contracts within Hubspot
 - Scheduling repairs as needed, including needs from tenant
- Administrative Support
 - Assist with mail services (UPS, FedEx, USPS)
 - Scanning/printing projects
 - Stocking of office/kitchen supplies

Minimum Standards/Requirements:

- Proficiency with Microsoft Office
- Excellent organizational and time management skills
- Excellent project management skills, including the ability to prioritize work and meet deadlines.
- Strong attention to detail and accuracy
- Effective communication skills, both verbal and written
- Ability to multitask and prioritize tasks effectively
- Willingness to adapt to changing priorities and work in a fast-paced environment

Work Experience

- 2+ years' experience in project management or administration

Education or Certifications

- High school diploma or equivalent

Soft Skills

- Strong leadership, written/verbal communication and interpersonal skills
- Ability and willingness to take initiative to drive projects to completion
- Ability to work independently, especially on research tasks, and to clearly articulate findings
- Positive attitude and willingness to collaborate with team members

Physical Requirements:

- Office environment. Position requires the ability to remain in a stationary position 25% of the time. Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine, and computer printer. Requires the ability to observe details at close range (computer monitors and reports). Requires the ability to position self to maintain files in file cabinets.