

**ALPER SERVICES  
POSITION DESCRIPTION**

**I. POSITION: Director of Claim Management Services**

II. Date: January 3, 2008  
- Department: Claim Management Services  
- Reports To: Bobette Puckett  
- Exempt: (x)

**II. POSITION DESCRIPTION:**

The Claim Management Executive is responsible for managing the CMS/Loss Control departments and all CMS activities and services. This includes claims management, services, service pricing, account servicing, legislative activities and making sure the office meets government requirements. Acts as a resource to Sales Executives in designing individual client / new prospect risk management programs / arranging required service

**A. Direct Reports:**

1. Loss Control Safety Consultant
2. Support Staff

**B. Relationships:**

1. Internal - All Team Leaders  
Account Executives  
Service Team Members  
Claims  
Accounting / administrative personnel
2. External - Clients  
Prospects  
Insurance Companies  
Risk management service vendors

**C. Decision Making Authority/Limitations**

1. Financial – Unit expenses in line with approved Budget.
2. Decision Making – Administrative and professional decisions within the scope of the position; including salary reviews, performance reviews, Team goals, and workflow distribution.

**III. ESSENTIAL FUNCTIONS:**

- A. Set strategies and review proposals with A/E's on new prospects, and at times assist A/E's in presentation meetings.
- B. Acts as resource to the Full Sales Team.
- C. Prepare Risk Management Solution Program Workshops (RMS) on a quarterly or less frequent basis for new Prospects.
- D. Prepares Reserve Reduction Presentations to specified Top 100 Clients with A/E's.
- E. Lead and direct Claim Management Services and Loss Control Team Leaders.
- F. Lead and direct Safety & Loss Control Team Leader on services provided to clients.
- G. Involvement on high-level claim issues which requires review and management decision.
- H. Review topics for Safety Seminars on an annual basis with CMS & Safety & Loss Control Team Leaders.
- I. Review Loss Control, Workers' Compensation Mod's and Claim Impact Summaries with AuditRate Consultant on new prospects and clients.
- J. Responsible for training and development of Team Members that report to Director.
- K. Conducts and prepares annual and 6-month Team Leaders (CMS/ Safety & Loss Control) performance and salary reviews, team goals & objectives.
- L. Miscellaneous legal-related projects for Alper Services.
- M. Special projects as assigned by President.

**IV. QUALIFICATIONS:**

- A. Education: Attorney/Property & Casualty Claims Required. Required to pursue insurance courses / ARM and/or CPCU professional designations. Required solicitor or agent's license.
- B. Experience: Multiple lines claim experience preferred, but strong background in General Liability & Product Liability; claims and understanding of Workers' Compensation claims and rating process.

**C. Skills:**

1. Good understanding of Workers' Compensation coverage.
2. Good knowledge of risk management concepts and techniques. Thorough understanding of broking process.
3. Good organization and time management skills. Detail oriented.
4. Ability to work effectively under pressure to meet deadlines. Ability to prioritize.
5. Good negotiation skills.
6. Good interpersonal skills.
7. Good written and verbal communication skills. Ability to communicate clearly by telephone.
8. High energy level.
9. Good computer skills and familiarity with currently required software. Primary skills required; Excel, Outlook, PowerPoint and Microsoft Word.

**WORKING CONDITIONS AND PHYSICAL EFFORT:**

- Work is normally performed in a typical interior/office work environment.
- No or very limited physical effort required.
- No or very limited exposure to physical risk.