



annuities • life • securities

**Title:** Workflow Processor  
**Department:** Annuity Service  
**Reports to:** Operations Supervisor  
**Status:** Full-time, Non-exempt  
**Location:** Overland Park, Kansas

The Workflow Processor is responsible for the review of all email communication received in the Contracting Service, Service First and Life Inboxes received by CreativeOne. This position identifies the individual requests from our producers and affiliated companies assigns them in a timely manner, to the writing designated sales support team.

**Duties and Responsibilities include, but not limited to:**

- Review and assign all agent requests, missing items, new applications, post issue items and communication received from our carriers.
- Contact producers, to obtain any missing information and requirements necessary to complete applications and contracts.
- Process agent policy owner service requests. This includes reaching out to our carriers to obtain requested information and reply to the agent. This requires developing relationships with Home Office contacts, at times will require being on hold for extended periods of time.
- Enter required information into the CreativeOne CRM, in a timely and thorough manner.
- Staying up to date on changing carrier forms and rate changes.

**Critical Skills Sought**

- Attention to detail.
- Excellent verbal and written communication skills. This position works in a customer service capacity.
- Strong sense of teamwork to accomplish departmental objectives.
- Ability to multi-task, while providing exceptional service to agents, carriers and teammates.
- Complete tasks within daily deadlines in a fast-paced environment.
- Teamwork
  - Develops and maintains effective working relationships at all levels.
  - Participates actively in development of team goals and plans; ultimately supports team decisions.
  - Works diligently to achieve team goals.
  - Keeps team members abreast of individual progress and shares information.
- Communication
  - Demonstrates strong verbal skills.
  - Participates in group meetings; provides thoughtful and appropriate comments.
  - Practices good listening skills by seeking clarification and checking for understanding.
  - Demonstrates respect, courtesy, tact, and cooperation in interaction with others.

***Our Core Values***

- *Provide Unreasonably Excellent Service*
- *Love What We Do*
- *Act with Integrity*
- *Collaborate Courageously*
- *Evolve with Purpose*

**Preferred Qualifications**

- Comfortable working in a Microsoft Office environment.
- Experience with general office technologies, such as: scanning, email, fax, website navigation, uploading documents.
- Minimum High School Diploma, or equivalent required.
- Insurance industry background is desired.

*This description covers the major purpose and major functions of the job. It is not intended to give all details or a step-by-step account of the way each task is to be performed. Employees may receive other job-related instructions and be required to perform other job-related duties requested by their supervisor. All requirements are subject to modification to provide reasonable accommodation to qualified individuals with disabilities.*

*CreativeOne provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state, or local laws.*