

## **Sales CSR**

Job hours are Monday through Friday, 8:00 to 4:30. Benefits of Health Insurance, Life Insurance, Disability Insurance, Vision Insurance, 401k, Paid Holidays and Paid Time Off are all available.

### **Qualifications:**

- High school diploma required. College degree preferred.
- Insurance industry experience preferred.
- Proficient in use of personal computer, word processing software, calculator and agency automation software.
- Ability to perform multiple tasks in a complex working environment, accurately and efficiently.
- Property/casualty agent's license is to be obtained within 3 months following the probationary period.

### **Standards of Performance:**

- Using proper English and telephone techniques.
- Greeting clients and visitors promptly and in a friendly manner.
- Working with others as a team and maintaining a positive and respectful attitude with colleagues.
- Maintaining the appearance of your work area & the office in general.
- Maintaining confidentiality of all information related to clients, customers, employees, carriers, or as appropriate, other information.
- Complying with the guidelines set forth in the office manual

### **Physical Demands:**

Must be physically able to work a minimum of 40 hours per week in the office. The employee is regularly required to see, hear and project voice well enough without amplification. There is frequent need for the employee to stand, sit, walk, use repetitive small motor activity, use hands and fingers, and reach with hands and arms. The employee is occasionally required to lift and carry up to 30 pounds; to stoop, kneel, crouch, or crawl, and to ascend and descend stairs. This position requires a high-energy level and ability to handle stress-related situations on a daily basis. The employee may be required to drive and travel unaccompanied in diverse weather conditions.

### **Primary Job Functions:**

Primary job function is to provide service to existing clients and quote new business, duties include but are not limited to the following:

1. If not already present, obtaining Property & Casualty and Life & Health licenses within first 3 months of employment.

2. Answering phones – answer telephone promptly & use intercom or instant message to alert co-worker of call.
3. Greeting clients at the counter
4. Billing - taking premium payments, generating receipts, answering billing questions
5. Taking Loss Reports
6. Issuing Certificates of Insurance
7. Servicing & Quoting Auto policies – including meeting with clients as needed
8. Servicing & Quoting Home policies – including meeting with clients as needed
9. Selling Life Insurance products
10. Answering Client Questions
11. Customer Correspondence
  - a. Thank you notes
  - b. New business correspondence
  - c. Endorsement correspondence
12. Education – remain refreshed on the policy coverages & provisions provided under the all policies sold by the agency, and attend insurance related education classes approved by management.

This job description is not intended as a contract and is subject to unilateral change and revision by management with or without notice at any time. I have read, understand, and agree to abide by the job description.

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