



Rev. 2/20/20

Licensed Sales Support/CSR

Overview:

This position is to support the everyday operations of the agency. The primary objective is to promote sales with new and existing business and provide excellent customer service to generate growth for the agency. The secondary objective is to support the Sales Advisor and Customer Experience Team by keeping the Agency Management System current with data that will enhance our client experience and keep us current with company records. The agent needs to learn their job duties, be professional, have a positive attitude, and ask for help when it is necessary.

Reports to: RV/PL Manager

Skills Needed: Microsoft Word/Excel, Applied Epic Management System, DocuSign, Insurance License

Duties/Activities:

- Quote leads that come through the internet, mail, and rallies, with all of our branches of companies.
- Data entry of renewals, cancellations, endorsements, and return mail for the Team.
- Submit payments to the company, handle underwriting memos, process changes, and update the Applied EPIC System.
- Handle claim calls or customers that come into the office and help the insured report or report to the carriers the same day.
- Document all conversations and correspondence of the clients account in the Applied Epic System and follow all the procedures established.
- Collect signed applications, cancellations, and any required documentation to attach to clients account.
- Issue new applications thru the company to the customer and document in the Applied Epic System.
- Know the underwriting and rating procedures of the companies and review all rate revisions, notifications, and policy changes to insure accurate field underwriting.
- Back up the Communication Coordinator and Sales Team Processor when needed.
- Help with overflow calls when needed.
- Follow the agencies workflows and maintain a high standard of accuracy.
- Insure confidentiality of the client's personal information.
- Maintain state licensing through continuing education classes.
- Attending monthly and weekly staff meetings.

- Be a team player and respect your coworkers.
- Help in other areas of the agency when needed.
- All other duties as assigned.

*Salary Range \$28k - \$32k

*40 Hours a week

*Monthly Bonus Opportunity after 90 days of probation

*Health and Vision Insurance after 90 days probation

*401K after 1 year of employment