

# Personal Lines Agent

## Overview:

This is a sales and service position. Insurance license not required at time of hiring but will need to be obtained within 90 days of hire date. The primary objective is to promote sales of new and existing business. The secondary objective is to provide excellent customer service for the client to generate growth for the agency. This position involves talking on the phone to clients and answering their product questions, solving problems and cross selling. The agent will be required to carry the agency's reputation in a professional manner when conducting business with both clients and companies that FCIS represents. The agent needs to learn their job duties, have a positive attitude, and ask for help when it is necessary.

**Reports to:** PL/RV Sales and Experience Manager

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

## Duties/Activities:

- Quote and sell policies/products.
- Ensure the customer service provided is to the best of your ability and is consistent with Company's core vision.
- Review the clients account and service their policies when needed. Offer them the best possible coverage available.
- Work expiration reports, review renewals, and follow up with clients.
- Document all conversations and correspondence of the clients account in the Applied System and follow all the procedures established.
- Know the underwriting and rating procedures of the companies and review all rate revisions, notifications, and policy changes to insure accurate field underwriting.
- Promote the cross sell of all product lines.
- Submit endorsements, cancellations, and payments to the company and document the change in Applied Systems
- 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.
- Attend RV rallies or shows and be a seminar presenter.
- Attending monthly and weekly staff meetings.
- Be a team player and respect your coworkers.
- Help out in other areas of the agency when needed.