**Job Description for Associate Agent**

**Purpose of Position**

Assist in planning, measuring, and implementation of sales goals for an Insurance Agency. Associate Agents are responsible for assisting in management of specific processes as well as servicing new and existing customers to meet the Agency’s financial goals.

**Licensed Requirements**

Property and Casualty Insurance License

**Minimum Performance Requirements**

Performance requirements are determined by Agency Principal and staff. Targets are assigned and updated on a monthly basis. ***Examples of such goals:*** 40 Property and Casualty (P&C) policies issued and 2 Life applications referred with a minimum of 30 P&C polices issued and 2 Life applications referred monthly to receive a quarterly variable bonus.

**Essential Functions**

* Complete daily activity log each morning and deliver to the Agency Principal
* Provide new business log to Agency Principal at the end of each day
* Enter all financial services follow-ups into tracking system each day
* Contact customers to obtain and verify appointments; daily target will be assigned
* Write new business applications using agency check list and call out activity
* Cold Call to potential customers to position insurance products
* Advise Agency Principal of any situations that should be monitored concerning any customer having suspicious or frequent claims.
* Cross-sell and upselling to existing customers
* Comply with Insurance Agency Policies, Procedures, and Office Guidelines
* Issue the minimum number of policies assigned as a target on a monthly basis
* Handle customer service activities as necessary
* Actively participate in training to improve sales, product knowledge, and skills to increase financials
* Assist in training other employees
* Improve sales in all lines of business, retention, cross-sell ratio, customer satisfaction, and reduce loss ratio while performing service work
* Participate in community events, as required
* Market to realtors, mortgage brokers, apartment owners, and other community contacts
* Write all brokered business for the Agency that accommodates the needs of existing customers
* Handle additional duties as assigned or required
* ***Responsible for Essential Functions and Job Requirements on Customer Care professional job description***
* M**aintain a positive and self-motivated attitude – Use entrepreneurial skills to maintain successful performance**
* Use of computer skills – Word, PowerPoint and Excel preferred