

# **ROBERT CARR INSURANCE AGENCY INC.**

## **Insurance Sales Agent**

### **General Outline of Duties & Responsibilities**

We currently have a full-time Insurance Sales Agent position available at our Trumbull County Headquarters located in Warren, Ohio. The Insurance Sales Agent produces high quality new business in support of various carriers that we produce on behalf of.

Responsibilities include, but are not limited to:

- Identifies and solicits sales prospects from various sources provided by agency, by making warm calls to our client base and other prospecting lists.
- Continuously develops expiration dates in quantities that are set periodically by management.
- Develops information and recommendations for prospective accounts, presents proposals in a professional manner and adheres to agency policies and procedures for writing new accounts.
- Meets on site with existing and prospective clients to aid in the selection of appropriate insurance coverage.
- Presents and promotes Agency products to customers by utilizing exceptional customer service skills and appropriate diagnostic sales techniques, in person, on the telephone, and in writing to all customers.
- Makes the sale and collects necessary deposits, arranges for binders, certificates, etc. Collects all premiums that are due on or before effective date of coverage.
- Prepares necessary paperwork and performs other duties necessary to process insurance sales and renewals, including applications, payments, receipts, corrections, endorsements, cancellations, etc.
- Provides customer service to walk-in policyholders and assists in the resolution of concerns and corrections.
- Makes recommendations to clients and prospects for best products to meet the needs of the insured.
- Achieves assigned sales and retention goals and other quotas as assigned.
- Negotiates annual new and renewal production goals Agency Principal and Vice President of Insurance Operations.
- Maintains monthly activity and production log and forwards to agency management at month's end.
- Attends all scheduled sales and training meetings as required. Participates in other development programs designed to enhance professionalism, knowledge and skills.

Qualifications include, but are not limited to:

- A college degree is preferred. An insurance industry professional designation may be substituted.
- Minimum 2 years personal lines insurance sales experience required.
- Must be willing to work toward and attain professional industry designations (e.g., CIC, CPCU, AAI, Etc.).
- Requires a current Ohio Property and Casualty Insurance License or a Life and Health License. Both must be obtained within 6 months of hire date to maintain employment.
- Must maintain a valid driver's license with a good driving record. No history of DUI or license suspension.
- Strong consultative/diagnostic sales and customer service skills.
- Proven communication, organizational and interpersonal skills.
- Ability to handle confidential information in a discreet and professional manner to avoid compromising a customer's privacy.