

Producer / Insurance Agent

Job Title: Producer / Insurance Agent
Department: Benefits
Reports To: Branch Manager
FLSA Status: Exempt
Location: TBD

Summary

The Producer is responsible for prospecting, soliciting, quoting and selling new and renewal accounts. Specific sales goals and service responsibilities are determined during the yearly planning process. Service and sales standards must be met with emphasis placed on the quality of the insurance product presented to the client.

Essential Duties and Responsibilities

Include but are not limited to the following. Other functions may be assigned as business conditions change.

1. Assists in the development of the sales objectives. Meets the forecasted premium volume and commission growth goals as established with Manager.
2. Creates and maintains prospect and suspect lists.
3. Request referrals from existing client base and respond to the referrals quickly and effectively.
4. Pre-qualifies insurance prospects for insurability and quality of risk.
5. Identifies the client's insurance needs, gaps in coverage, and loss exposures (insurable and uninsurable).
6. Obtains accurate information from the prospects, including completing applications, supplemental questionnaires, risk surveys, and other related documentation in order to provide complete, comprehensive submissions.
7. Designs insurance programs and recommends insurance coverage to clients.
8. Meets agency standards for account receivables.
9. Participates in community activities.
10. Reviews clients insurance programs annually and makes recommendations.
11. Accurately documents client files and electronic files as to coverage discussions, quotes, declination, coverage change or declined.
12. Maintain a concern for timeliness and completeness when interacting with clients, agency and company personnel to minimize potentials for error or omission claims.
13. Follow agency Standard of Excellence and Best Practices procedures for processing and preparation of customer correspondence, certificates of insurance, binders, cancellation requests, insurance I.D. cards and internal correspondence as requested ensuring that activities and follow-ups are set and the client file in the agency management systems is updated and consistent with the paper file.

Education and/or Experience

High school diploma; some college or Insurance Industry related experience; or combination of education and experience.

Language Skills

Ability to read, analyze, compare, and interpret insurance policies, coverages, documents and regulations. Ability to write reports and business correspondence. Ability to effectively establish rapport, present information and respond to questions from managers, clients, customers and the general public orally and in writing. Ability to sell and explain additional coverages and gaps. Skill and ability to meet people and listen.

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Reasoning Ability

High Skills. Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

Computer Skills

Working knowledge of Microsoft Office products such as Word, Excel, Power Point and Access. Experience in Applied Agency Management System of other similar system for client and policy file maintenance.

Certificates, Licenses, Registrations

Valid driver's license required with proof of insurance. State-specific insurance license or ability and desire to obtain required.

For immediate confidential consideration, please e-mail your resume to Careers@mahoneygroup.com. Please be sure to reference the job title and job code in the subject line of your e-mail as follows:

Producer / Insurance Agent Job Code: 06-537.

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