

## **JOB DESCRIPTION**

JOB TITLE: Insurance Sales and Service Representative  
DEPARTMENT: Commercial Lines  
REPORTS TO: Commercial Lines Manager  
WORK HOURS: 8:00 AM to 5:00 PM Monday through Friday, One Hour Lunch  
Option for 8:30 AM to 5:30 PM

### **Summary:**

The role of this position will be to work with the commercial lines department assisting in new business sales and the servicing of existing clients.

### **Essential Duties and Responsibilities:**

Prospect, quote and close sales of new commercial insurance policies. Will need to be proficient working in our client database and management system to produce applications, maintain client records, review and service renewals and remarket client accounts as necessary. Attention to detail and accurate work is essential. Must be comfortable working in a team environment and responsive when asked to balance work or back-up another member of the team.

All other duties in support of the commercial department or the agency as directed.

### **Minimum Education Required:**

High School Diploma

### **Certificates, Licenses and Registrations Required:**

Montana Insurance License Examination must be taken and passed, as position will require a valid Insurance License.

### **Specific Personality Traits:**

Must be confident and able to deal with the general public in a positive, respectful and professional manner. Will need to manage a busy desk with interruptions, and prioritize date sensitive work flow. May be asked to make outside calls prospecting for new business. Maintain a positive and even temperament in the office, be dependable and punctual. Have an enthusiasm for learning and enjoy the creative challenge of developing insurance coverage that is often unique to each commercial client.

### **Knowledge and Skills Required:**

Prefer industry knowledge of terminology and coverage concepts. Proficient with a personal computer, Microsoft Office software, Excel, standard office equipment, business telephone system, and experience working with databases.

### **Supervisory Responsibilities:**

None

### **Physical Demands:**

Office environment, sitting for extended periods, light lifting.

### **Appearance or Dress Code:**

Professional office attire with some restrictions.