



### **Sales & Service Agent**

The SSA is responsible for servicing the needs of potential and existing customers of Insure-Link (FedNat's Agency) to ensure customers understand their coverage needs, are provided coverage packages to choose from, and are assisted with having their coverage bound, issued or renewed.

#### ***Duties & Responsibilities:***

- Create a pleasant and positive experience for the customer.
- Keep the EPIC management system updated with all customer information, scanned copies of emails and other supporting documents, and transaction notes
- Working with Potential New Customers
  - Help the customer identify coverage needs and the coverage package they want to purchase.
  - Assist the customer in gathering all necessary information to bind and issue the coverage.
  - Recognize E&O exposures and use necessary methods to prevent or document the account.
  - Working with the customer and carrier, complete all documents required to have the policy issued and billing established. Work with the customer to select the best payment option for them.
  - Post coverage issuance
- Prepare and process billing, finance and other contracts and check payments.
- Process all cancellation and non-renewal requests
- Order reports as needed. This would include MVRs, Wind Mitigation, etc.
- Respond to carrier requests
- Be current on all carrier underwriting and other coverage requirements or offerings.
- Be current on all of Insure-Link's policies and procedures.

#### ***Skills:***

- Exceptional Interpersonal and Customer Service communication skills; written and oral;
- Initiative and ability to think logically and critically;
- Ability to work independently and with minimal supervision;
- Strong time-management skills and organization skills;
- Strong computer skills with a penchant to adapt easily to learning new software and procedures.

#### ***Education & Experience:***

- Florida 4-40 Insurance license;
- 3 or more years property casualty insurance experience
- 3 or more years agency sales or service experience
- High School Diploma or equivalent

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