



## **Job Description**

### **Sales & Service Representative**

#### **Position Description:**

The SSR 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.

#### **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.

#### **Knowledge and 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.

**Experience & Education:**

- Florida 4-40 or 2-20 Insurance license;
- 3 or more years property casualty insurance experience
- 3 or more years agency sales or service experience
- High School Diploma or equivalent

**Physical requirements:**

- **Sedentary Work.** Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
- **Visual Acuity.** Required to have close visual acuity to perform activities such as: preparing and analyzing data and figures, viewing computer terminal, extensive reading.
- **Reaching.** Extending hand(s) and arm(s) in any direction
- **Fingering.** Picking, pinching typing or otherwise working primarily with fingers rather than with whole hands
- **Repetitive Motion.** Substantial movements (motions) of the wrist, hands and/or fingers.
- **Talking.** Expressing or exchanging ideas by means of the spoken work. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.

**Department:** Agency

**Reports to:** Agency Supervisor

**FLSA Status:** Non-Exempt

**Position Level:**

FedNat is an Equal Employment Opportunity Employer, DFW, offering a comprehensive benefit program including, Medical, Dental, Life Insurance, 401K, Tuition Reimbursement, with a great management team and working environment.