

FASTFORWARD

Insurance Services

“The Right Coverage, At The Right Price”

1175 Idaho Street Ste 201, Redlands, CA 92373 (909-212-8305)
www.fastforwardinsurance.com CA License # 0M92193

Title: Producer

Reports To: Primarily Darnell Ferguson, President

Job Summary: The Producer/CSR performs the essential functions of the position, which include aiding clients with service needs and making changes to existing accounts. Specific service and marketing responsibilities are required in this position. Meets service and sales delivery standards and performs essential functions to the quality and service standards developed by the agency.

PRIMARY RESPONSIBILITIES AND DUTIES

New Business

- Work as an efficient team with agency producer to assemble, market and place coverage for new clients
- Assists clients with making coverage; uses each contact with the client as an opportunity to review the whole account, round it and market
- Provides technical support to producers to benefit clients and to reach producer and agency's strategic business goals
- Prepares proposals and completes applications in coordination with producer; submits applications to eligible and appropriate carriers; obtains client signatures on all applications; follows up to ensure timely receipt of quotations and policies.
- Attends to clients needs by producing binders, certificates, policies, endorsements, and other related items; verifies their their accuracy using established agency checklist.

Retention:

- Prepares summaries of insurance, schedules, and proposals as needed for account review.
- Re-market renewals, contacts clients, creates renewal proposals, and handles other renewal activities in coordination with the producers. This includes 60 day advance account review for marketing, renewal letter mailed/emailed for insured updates, and cross-sell opportunities.
- Renews policies following agency standards; verifies each renewal's accuracy; ensures that all renewals are processed.

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- Reviews audits of policies; verifies accuracy and facilitates corrections, as needed between client and carrier
- Maintains and updates files in agency management system
- Process incoming email and mail requests, responding promptly and appropriately.
- Verifies accuracy of all direct billed cancellations and takes appropriate corrective action when needed.
- Determines reason for requests for cancellations; acts to save accounts; notifies producer according to agency standards.
- Processes and follow up on cancellation requests to carriers to ensure appropriate receipts to payers.
- Assists clients in submitting first reports of claims, facilitates prompt response from carrier staff and follows up on claims status to keep insureds informed.

Personal and Organizational Development:

- Sets priorities and manages workflow to ensure efficient, timely, and accurate processing of transactions and other responsibilities, including prioritizing workflow based on urgency, new business vs. renewal, expiration date of policy, revenue size of account and potential to close.
- Maintains a cordial and professional relationship with clients, co-workers, carriers, vendors, and other business contacts.
- Keeps informed regarding industry information, new product information, legislation, coverages, and technology to continually improve knowledge and performance.
- Interacts with others effectively by utilizing good communication skills, cooperating purposefully, and providing information and guidance, as needed, to achieve the business goals of the agency and producer.
- Strong ethical values and integrity

Knowledge, Skills, and Abilities

- Active Property and Casualty License.
- College education or equivalent insurance experience
- Ability to communicate orally and in writing with others to explain complex issues. Ability to receive and interpret complex information, and respond appropriately.
- Ability to meet new monthly and quarterly sales goals
- Thorough, detail-oriented to manage multiple clients, tasks, and requests.
- Adequate knowledge of rating procedures, coverages, and industry operations to effectively manage, maintain, and write assigned client and prospect lists
- Ability to carry out complex tasks with many concrete and abstract variables.
- Ability to add, subtract, multiply, and divide whole numbers, and to accurately perform simple calculations involving decimals and fractions.
- Ability to utilize computer programs and understand functionality.

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- Professional, committed and self motivated with the ability to focus on daily tasks.
- Proficient with Microsoft Office-Outlook, Word, Excel

Working Conditions:

- At times high pressure, fast-paced environment with significant disruptions. Large numbers of multiple steps in complex systems performed with accuracy and speed are essential to the successful growth of the agency.
- This job description is intended to describe the level of work required by the person performing the work of the positions and physical requirements normal to the position. Principal duties outlined are the essential responsibilities and other duties may be assigned as needs arise or as required to support principal duties.
- This description is not intended as a contract and is subject to change and revision as needs arise. Any written contractual agreements will supersede this job description. All requirements may be modified reasonably to accommodate physically or mentally challenged staff members.

Deadline to apply: TBD