



Position Title: Personal Lines/Small Business Producer (BOP
DESK)
Reports To: Personal Lines Manager

Job and Skill Requirements:

- 1) Must have a State of California Property and Casualty Insurance License or the ability to obtain such a license.
- 2) Must have excellent technology skills including, but not limited to, proficiency in using a computer and knowledge of Microsoft Outlook and Word. Knowledge of AMS 360 On-line software is a plus.
- 3) Powerful relationship building and interpersonal skills.
- 4) Have the tenacity and drive to set and work towards achieving goals. Thrives on quantifiable results and benchmarks.
- 5) Be able to demonstrate outstanding organization and neatness skills. Must adhere to offices systems and procedures.
- 6) Ability to rapidly learn underwriting guidelines and policy coverages and have the communication skills to clearly explain such information to others.
- 7) Have the ability to prioritize time to maximize potential client contact.

Supporting Functions:

- 1) Must prospect for potential clients and cross sell current clients. Prospecting would include, but not limited to, making outbound telephone calls, visiting prospects, sending direct mail pieces, and using social media.
- 2) Assist in organizing prospecting events, such as safe driver courses, using resources provided by insurance companies.
- 3) Perform analysis of clients and potential client's insurance needs and explain the differences.
- 4) Gather all necessary underwriting information and input it according to insurance carrier requirements.
- 5) Create submissions for insurance quotes using insurance and agency quoting systems.
- 6) Present insurance quotes/proposals to prospective clients while understanding the concept of value selling rather than relying on selling by price.
- 7) Be prompt and efficient when addressing clients service requests.
- 8) Communicate with insurance carriers regarding client accounts.

Resume and interest inquiries should be sent directly to Myron Gomes in Gold River, CA. Apply by September 1, 2014.

Myron Gomes – Vice President
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