

RECEPTIONIST

Job Description:

This position handles receptionist duties as well as basic client services such as phone calls, faxes, mail, and client payments. This position is a central hub for everyone in the office as they will coordinate and rely upon this position for a variety of services and information. It is important for this person to be able to multi-task and handle a variety of tasks with constant interruptions from phone calls and clients.

Job Requirements:

- Must be able to obtain an Insurance License and be appointed with companies
- Must be competent with Microsoft Office Products
- Possess excellent communication skills, both written and verbal.
- Must be able to do basic math skills and simple calculations involving decimals and fractions.
- Physical efforts required including keyboarding, repetitive small motor activity, reaching, stopping, standing, and lifting light objects under 10 pounds frequently and occasionally larger packages up to 50 pounds.

Key Responsibilities:

- Be personable and work to build relationships with existing clients and prospects.
- Demonstrate a high level of consistency between words and actions across all business situations. Accepts ultimate responsibility for results.
- Demonstrate a basic understanding of insurance coverages and be able to educate clients about policy coverages and exclusions.
- Processes basic client services such as payments, auto ID cards, switching of vehicles, and cancellations.
- Ensures confidentiality of client information.
- Receives phone calls and determines the purpose of the phone call and transfers to the appropriate person.
- Document actions and information in Agency Management System. Keep records of customer interactions, documents, comments, and details.
- Successfully transact policy transactions in agency system for proper client billing and reconciliations of commissions.
- Process mail daily to distribute to correct person and scan into agency management system.
- Process all faxes and forwards to the appropriate person.
- Process client cash transactions, and reconcile daily. Does banking and deposits.
- Responsible for ensuring organization and cleanliness of front office and conference room.
- Provide personal lines quotes as needed to assist with new client sales.
- Responsible for ordering office supplies and maintaining agency supplies.

Job Competencies

To perform the job successfully, an individual demonstrates the following competencies:

- **Problem Solving** – Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in team problem solving situations; Uses reason even when dealing with emotional topics.
- **Technical Skills** – Assesses own strengths and weaknesses; Pursues training and development opportunities; Implements action plan from training; Strives to continuously build knowledge and skills; Shares expertise with others.
- **Customer Service** – Manages difficult or emotional customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service and assistance; Meets commitments.
- **Interpersonal Skills** – Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things; Addresses problems directly with the individual involved.
- **Oral Communication** – Speaks clearly and persuasively in positive or negative situations; Listens and gets clarification; Responds well to questions; Participates actively in meetings.
- **Written Communication** – Writes clearly and informatively; Edits work for spelling and grammar; Varies writing style to meet needs; Presents numerical data effectively; Able to read and interpret written information.
- **Teamwork** – Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Supports everyone's efforts to succeed.
- **Quality Management** – Looks for ways to improve and promote quality; Demonstrates accuracy and thoroughness.
- **Cost Consciousness** – Works within approved budget; Develops and implements cost-saving measures.
- **Diversity** – Demonstrates knowledge of EEO policy; Shows respect and sensitivity for cultural differences; Promotes a harassment-free environment.
- **Ethics** – Treats people with respect; Keeps commitments; Inspires the trust of others; Works with integrity and ethically; Upholds organizational values.
- **Organizational Support** – Follows policies and procedures; Completes tasks correctly and on time; Supports organization's goals and values.
- **Judgment** – Displays willingness to make decisions in a timely manner; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process.
- **Motivation** – Sets and achieves challenging goals; Demonstrates persistence and overcomes obstacles; Measures self against standard of excellence; Takes calculated risks to accomplish goals.
- **Planning/Organization** – Prioritizes and plans work activities; Uses time efficiently; Plans for additional resources; Develops realistic action plans.
- **Professionalism** – Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments.
- **Quality** – Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies feedback to improve performance; Monitors own work to ensure quality.

- **Adaptability** – Adapts to changes in the work environment; Manages competing demands; Changes approach or method to best fit the situation; Able to deal with frequent changes, delays, or unexpected events.
- **Attendance/Punctuality** – Consistently arrives to work on time; Ensures work responsibilities are covered when absent; Arrives at meetings and appointments on time.
- **Dependability** – Follows instructions; Responds to management direction; Takes responsibility for own actions; Keeps commitments; Commits to long hours of work when necessary to reach goals; Completes tasks on time or notifies appropriate person with an alternate plan.
- **Initiative** – Volunteers readily; Undertakes self-development activities; Seeks increased responsibilities; Takes independent actions and calculated risks; Looks for and takes advantage of opportunities; Asks for and offers help when needed.
- **Innovation** – Displays original thinking and creativity; Meets challenges with resourcefulness; Generates suggestions for improving work; Develops innovative approaches and ideas; Presents ideas and information in a manner that gets others' attention.