

## **Petersburg Insurance Center Job Description Agent Trainee**

**Title:** Agent Trainee

**Report to:** Manager

**Job Summary:** Answers and accurately directs phone calls professionally, greets clients and visitors positively, maintains the programming and maintenance of the telephone system, and obtains professional assistance as needed. Performs word processing and data entry projects as needed or requested. Meets agency service standards of time and quality. Accepts on-time agency-billed and direct-billed payments and provides a receipt.

### **Primary Responsibilities and Duties:**

#### **Switchboard and Reception Area**

Answers incoming calls, within three rings, positively and warmly.  
Accurately directs caller to the appropriate people courteously and professionally.

Returns to calls placed on hold every 45 seconds, giving the caller the option to continue holding or to leave a message.

Answers client inquiries, as needed, or directs the inquiry to the person best able to answer.

Takes and delivers accurate phone messages, with call back numbers, area codes, and names legibly written and promptly relays messages to the proper person.

Greets incoming clients and visitors in a friendly and positive way. Quickly notifies the person being visited.

Maintains a neat and tidy reception area, clearing up any clutter on an ongoing basis, and maintains a professional, comfortable general office atmosphere.

#### **Administration**

Opens, sorts, separates and distributes mail neatly and accurately for the agency personnel according to mail distribution workforce.

Treats direct bill notices of cancellation as priority items, notifying CSAs and producers within one hour of receipt.

Stuffs, sorts and labels outgoing bulk-mail projects.

Enters on-time, agency-billed payments received from clients into computer billing screens and documents the payments electronically on every accepted payment. Issues receipts on every accepted cash payment. Handles direct-billed payments. Verifies coverage status processes, as appropriate. Provides receipt or directs receptionist to handle.

### **Agency Services**

Assists clients in submitting first reports of claims. Obtains adjusters or visits from agency staff, facilitates prompt response from company staff and follows up on claims status to keep insureds informed and to work toward settlement of claims.

Maintains orderly electronic files and information, following agency standards.

Verifies accuracy and coverage adequacy of policies. Requests changes to correct errors and follows up

### **Personal and Organizational Development**

Actively seeks out and performs other agency services support functions and performs clerical duties, as requested or required by others, such as copying documents or faxing.

Assists in preparing and processing bulk mailing projects and other agency projects which require organization and attention to rote detail.

Performs other tasks and duties, as requested or required.

### **Knowledge, Skills and Abilities**

High School diploma or equivalent, computer keyboarding skills, effective communication skills, friendly and outgoing personality, organizational skills and ability to respond to requests effectively and efficiently.

Ability to learn computer programming of the telephone system and to understand when and how to gain professional outside assistance, as appropriate needs arise.

Understands and can perform basic office-practice skills, including filing, typing, processing and sorting functions.

Can carry out detailed written or verbal instructions.

Can add, subtract, multiply and divide whole numbers and perform simple calculations involving decimals and simple fractions.

Ability to file, post, sort or prepare mail projects. Can copy data from one source to another, obtain information from others, and deliver information to others clearly and accurately.

Ability to perform 90% sedentary work, exert up to 10 pounds of force occasionally, and exert negligible force frequently, or constantly move objects, including the human body. May be asked to exert up to 20 pounds of force periodically as needed.

Near vision clarity of 20 inches or less and mid range distance of more than 20 inches and less than 20 feet. Field of vision must be adequate to observe up and down or right to left while eyes are fixed on a given point.

Minimal physical efforts required to perform the position include fingering as a repetitive activity, grasping, verbally communicating detailed and important information to others accurately and quickly, stooping, reaching, standing, and lifting light objects less than 10 pounds.

### **Working Conditions**

High-pressured, fast-paced environment with significant telephone and personal disruption. Large number of multiple steps in complex system performed with accuracy and speed is essential to the successful completion of tasks.

This job description is intended to describe the normal level of work required by the person performing the work. The principle duties outlined are the essential responsibilities and duties. Other duties may be assigned, as needs arise or as required.

This description is not intended as a contract and is subject to change. Any written contractual agreements supersede this job description. All requirements may be reasonably modified to accommodate physically or mentally challenged staff members.