



**HOTCHKISS**  
INSURANCE AGENCY, INC.

## Hotchkiss Insurance Agency, Inc. Job Description

**Job Title:** Sales Agent Trainee - Benefits Department  
**Department:** Benefits  
**Reports To:** Benefits Department Manager

**FLSA Status:** Exempt  
**Salary Range:**  
**Prepared Date:** 04/01/2006

### SUMMARY

This position will learn successful appointment setting techniques, assist sales agents in the completion of applications and attend sales appointments with producers and agents. This position will identify and solicit prospects from various sources provided by the agency. This position will carry the agency's reputation and professional manner of conducting business into the dealings with clients.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following. Other duties may be assigned.

#### *General Responsibilities*

- Identify and solicit sales prospects from various sources provided by the agency, by cold calling, and phone contact.
- Solicit referrals from existing agency accounts and x-dates from sources other than those provided after approval by agency management.
- Meet on and off site, with existing and prospective clients to observe agents' reviews of exposures, and insurance needs.
- Support and enhance standing of office personnel with clients.
- Coordinate timely presentations for both new and renewal business.
- Assist in marketing accounts where appropriate due to relationships or product expertise.
- Coordinate with Account Managers for service of existing accounts.
- Achieve a balance in production to meet agency "mix of business" goals.
- Other duties as required

#### *New Business Responsibilities*

- Expected to meet the monthly new business premium or account goals through a variety sources such as cold calls, referrals, niche marketing, etc.
- Acquire enough information to complete applications, and additional documentation for new business submissions.
- Be available for communication with new business department, underwriter, account managers, etc.
- Present the proposal in a professional manner.
- Make the sale and collect necessary first month's premium.
- Arrange for delivery of the policy when received from the company.

#### *Renewal Responsibilities*

- Cooperate in obtaining updates for shopping the account.
- Assist in submissions (letters, calls, etc.)
- Presentation of renewal, if necessary, in a professional manner.
- Collect any monies, as required
- Arrange for delivery of policy when received from the company.

#### *Marketing Responsibilities*

- Maintain knowledge of underwriting criteria for carriers represented by the agency.
- Select markets and coordinate with service assistant in submission of risk to various markets.

## **ASSOCIATE RESPONSIBILITIES**

Must follow all agency workflows, guidelines, and procedures including, but not limited to the contents of the Associate Handbook. Must immediately report all malfunctions of *The Agency Manager* software (TAM) and any other hardware, software, system or equipment to the appropriate individual.

## **GENERAL**

- This job description is intended to describe the level of work required of the person performing the job.
- Essential functions are outlined; other duties may be assigned as needs arise or as required to support the agency's essential functions.
- This description is not intended as a contract and is subject to unilateral change and revision by management
- All requirements may be modified to reasonably accommodate physically or mentally challenged employees.

## **SUPERVISORY RESPONSIBILITIES**

This job has no supervisory responsibilities.

**QUALIFICATIONS** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the job.

## **EDUCATION, EXPERIENCE and/or LICENSING**

Texas Life and Health License issued by the Texas Department of Insurance. Some college coursework.

## **COMMUNICATION SKILLS**

Must be deemed to effectively speak, read, write, and effectively comprehend English. Bilingual skills are required/preferred (English/Spanish).

## **MATHEMATICAL SKILLS**

Must possess basic math skills. Ability to perform these basic operations using units of American money and weight measurement, and volume.

Ability to calculate premiums based on exposures and rates. Ability to apply payments and/or refunds to specific invoices and item numbers.

## **INDUSTRY REQUIREMENTS**

General Lines Life and Health License required.

## **DISPOSITION**

Conduct business in a professional manner at all times both inside and outside of the office. Teamwork environment.

## **REASONING ABILITY**

Ability to apply common sense understanding to carry out detailed written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations. Ability to anticipate and resolve future problems before they occur. Ability to solicit assistance when necessary. Ability to problem solve beyond conventional solutions (think outside of the box). To think and act at all time in the best interest of the Agency, Customer, and Carrier.

**PHYSICAL DEMANDS** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to sit and use hands to operate computer keyboard and telephone. The employee is occasionally required to stand, walk, and reach with hands and arms. The employee must occasionally lift and/or move up to 50 pounds.

**WORK ENVIRONMENT** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

This position works in a typical office environment. The noise level in the work environment is usually moderate.

**I have read, understand, and agree to abide by the job description.**

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Signature

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Date