

# Marshfield Insurance Agency Inc.

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## **Job description: Producer**

**General Description:** A Producer manages, serves and advises clients regarding insurance offerings. The Producer sells new accounts and renews existing accounts in alignment with agency and individual goals, while building relationships with clients.

### **Essential qualifications:**

- Relationship driven, effective communicator with client-centric work ethic
- Unshakeable demeanor and ability to “get past no”
- The ability to willingness to solve problems. Proactively initiate and follow through with multiple projects, with frequently changing priorities in a fast paced environment
- High school diploma or equivalent is required; higher education including but not limited to professional designations are encouraged
- WI Property & Casualty license required. May obtain post-hire

### **Duties/responsibilities include:**

- Drive revenue and growth for the agency; Identify and pursue business opportunities with prospects; Build strong relationships with clients and provide consultation on the individual challenges
- Solicit referrals from existing agency accounts
- Develops information and recommendations for prospective accounts, presents sales proposals, and adheres to agency policies and procedures for writing a new account
- Assist in resolving any situations for accounts produced
- Document prospect/client interactions (phone calls, emails, in person visits) within the management system using activities with appropriate codes
- Attach documents, etc. to the management system
- Update opportunities and/or activities in a timely manner
- Participate in weekly meetings with the Customer Service Agents (CSA). Ongoing communication with the CSA for new business, renewals, and client concerns
- Encourage and support a positive relationship between clients and servicing personnel
- Coordinate and present timely presentations for both new and renewal business
- Assist in marketing accounts where appropriate due to relationships or product expertise
- Coordinate with Customer Service Agent for service of existing accounts
- Achieve a balance in production to meet agency goals
- Maintain a working knowledge of client information in the system
- Maintain necessary licenses and continuing education required for license renewal
- Attend classes, seminars, and courses to increase knowledge and skill

## **Procedures**

### **New Business:**

Expected to meet new business premium goals through a variety of sources: cold calls, referrals, niche marketing, etc. Must acquire all necessary information for a quality new business submission, using the Fact-Finding sheets.

- Enough information to complete application, loss runs or letter, questionnaires, photos, diagrams, grading of risk, etc.
- Be available for communication with new business department, underwriter, loss control, etc.
- Present the proposal in a professional manner
- Make the sale and pick-up necessary deposit and arrange for binders, certificates, etc.

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- Arrange for delivery of the policy when received from company

## **Renewals:**

- 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 company

## **Marketing:**

- Maintain knowledge of underwriting criteria for carriers represented by agency
- Select markets and coordinate with service assistant in submission of risk to various markets
- Maintain a working relationship with underwriters enabling producer to negotiate as required for placement of risks

## **Accounting:**

- Producers are expected to arrange for payment of premium in a competent manner utilizing company financing, outside financing, installments, etc.
- Producers will assist in collecting earned premiums, audit premiums, etc. when called upon. Any uncollected premiums are the responsibility of the producer

## **Image and Behavior:**

- Producers are to conduct themselves in a professional manner at all times both inside as well as outside the office. The agency wants a team work atmosphere inside the office with everyone treated with respect
- Dress or attire should be fitting that of an insurance professional with flexibility given for type of appointments
- Ensure Outlook calendar is up to date. (The Agency looks professional knowing where you are)

**Work Status:** Full time

**Reporting:** Owner / President

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Employee Signature

Date

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Manager Signature

Date