



Insurance & Real Estate

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www.dagefordeagency.com

Job Description – Insurance Sales Agent

Dageforde Agency is looking for a licensed insurance producer to join the staff of our independent agency. An insurance agent is a professional, licensed risk advisor who helps customers protect and build their assets. Would prefer a full-time commitment, but will consider a possible part-time position. While experience is preferred, we are willing to train the right individual.

Application Process

Please e-mail resume and employment application to dagefordeagency@windstream.net. Employment application can be found on our website at www.dagefordeagency.com.

Essential Duties and Job Responsibilities

Service is the cornerstone of our independent agency. The essentials of the duties are not limited to the items below:

- Provide excellent customer service to policyholders.
- Identify clients' insurance needs, gaps in coverage, and loss exposures, both insurable and uninsurable.
- Obtain accurate information from clients and prospects, including completing applications, supplemental forms, onsite surveys, and other related documentation and relay to insurance companies utilizing company specific computerized programs.
- Greet customers and potential prospects in office and out in community with professional and friendly manner.
- Maintain a courteous and effective relationship with clients, co-workers, carriers and other business contacts.
- Order and process customer change requests in a timely manner.
- Assist clients with reporting claims.
- Generate and pursue new client opportunities, including scheduling appointments and presentation of proposals to prospects.
- Documentation of all client related activity, including personal visits, e-mails, and phone calls.
- Onsite visits to customers to assess risks and gaps in coverage.
- Make arrangements with clients to insure premium payment on timely basis and be responsible for collections.
- Proactively review customer policies and follow through on commitments.
- Actively keep customers aware of new products available, as well as cross selling of available products and services.
- Attain Nebraska (and Kansas) insurance licenses for Property and Casualty at the minimum. Other licenses are welcomed and encouraged.
- Minimize potential for error and omission claims.
- Ability to pass background check for licensing.
- Other duties as assigned.

Competencies

- Self-starter, multi tasker with enthusiastic attitude who enjoys solving problems for customers.
- Ethical and honest individual, with strong work ethic.
- Ability to manage time and prioritize job duties and customer needs.
 - ✓ Ability to be confident and work in a fast paced environment with deadlines
 - ✓ Ability to work independently or in a team
 - ✓ Ability to deal with interruptions in office environment
- Willingness to learn and be coachable.
- Maintains strict confidentiality of client information.
- Maintain certificates, licenses, registrations: valid driver's license and provision of own vehicle with proof of insurance; Nebraska insurance license or ability and desire to obtain insurance license; Attend ongoing continuing education to maintain insurance licenses in Kansas and Nebraska.
- High level computer skills preferred – above average skills in Microsoft Word, Excel, Outlook, editing PDF's, Email and various Windows & internet based applications, as this is the core of our business communications.
- Attention to detail and accuracy.
- Language and communication skills: Ability to read, analyze, compare, and interpret insurance policies, coverages, documents, and regulations. Ability to write reports and business correspondence. Strong attention to grammar and e-mail etiquette. Exceptional communication skills – verbal, phone, written including e-mail, and listening to effectively establish rapport, present information and respond to questions from customers and general public orally and in writing. Ability to explain additional coverages and gaps in insurance. Conflict management skills including considerable tact, diplomacy, discretion with situations involving angry or frustrated customers.
- Mathematical skills: ability to calculate premiums, such as discounts, interest, commissions, proportions, percentages, area, circumference, square footage, and volume.
- Basic accounting skills helpful.
- Knowledge of social media marketing helpful.
- Agricultural background desirable.
- Participate in community activities and networking opportunities.

Physical Demands and Work Environment:

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 accommodation 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 sit, stand, walk, talk, hear, stoop, kneel, crouch, use hands to finger, handle, or feel items. Occasionally need to lift and/or move items up to 30 pounds. Specific vision abilities required on this job include close vision.

The work environment is an office environment that includes phone and customer interruptions and contact with customers, prospects, and the public. Local travel and limited non-local travel required with employees personal vehicle. Visits to customers home, business, or farm are an integral part of the job duties.