

## **Customer Service Representative – Insurance**

### **Company Overview:**

Penwell Insurance is a dynamic and growing insurance agency dedicated to providing exceptional service and comprehensive coverage to our clients. We specialize in Personal insurance including home, auto, and life insurance. As we continue to expand our operations, we are seeking a motivated individual to join our team as an Entry-Level Insurance Agency Assistant.

### **Position Overview:**

Penwell Insurance is seeking an enthusiastic, service-oriented individual who shows professionalism and can provide a consultative approach to inform customers while managing multiple tasks in a fast-paced environment where quick response times are imperative. This is a full-time position Monday through Friday rotated between Carmel, IN and Cicero, IN with 1-day remote option based on performance.

### **Do You:**

- Have an eye for detail
- Posses a professional calm and poised demeanor
- Take personal pride in helping and educating customers

### **Requirements:**

- Insurance experience not required. However, an insurance license will need to be obtained in Auto, Home, and Life Insurance, if not already licensed. A one week in-person class and the first exam fee will be paid by Penwell Insurance.
- Maintain insurance license by meeting continuing education (CE) requirements by taking CE classes. CE classes are often free and are the responsibility of the individual to maintain and pay applicable nominal fees.
- Position requires sitting, standing, limited walking and speaking on the phone for extended periods.
- Extremely limited after-hours expectations except for community events that we participate in or host which will be known in advance.

### **Essential Job Functions:**

- Work in a Microsoft Office 365 based work environment and be able to type quickly while on the phone.
- Work with multiple insurance carrier systems, underwriters, lenders, and clients to create and review proposals, and submit applications when working with existing clients.
- Answer phones, consult with clients regarding insurance coverage, policy changes, insurance reviews and provide recommendations as appropriate.

- Source new lead opportunities by requesting referrals and seeking online reviews.
- Ensure clients receive prompt, efficient, and courteous attention.
- Work closely and openly with the service and management team as prospects transition to clients.
- Assist team with daily tasks.
- Track and log all progress and activity within the agency management system with a high level of accuracy.
- Listen, learn, apply, and make recommendations for improving processes.
- Maintain a clean and professional office environment.
- Assist with special projects and other duties as assigned by insurance agents or management.

**Essential Soft Skills:**

- Ethical & trustworthy
- Confident and assertive when necessary
- Communicates openly and honestly
- Service minded
- Cool under pressure
- Professional demeanor
- Personable and friendly
- Dedicated
- Team player
- Capable of functioning in a fast-paced environment
- Skilled multi-tasker
- Motivated to learn
- Adaptable to various situations and audiences
- Organized
- Ability to prioritize and craft self-deadlines
- Growth driven
- Relationship builder
- Passionate

**Benefits:**

- Paid Time Off is 120 hours (3 weeks) after the introductory review period and increases to 160 hours after year 5
- 9 Paid Holidays including 2 Flex Holidays (to accommodate religious, cultural, or other unpaid holidays)
- 1 Preapproved paid volunteer day
- Remote work from home a minimum of once a week based on performance
- Bonus opportunity
- Retirement Savings Plan
- Opportunities for career advancement and professional development
- Pay is \$37,500 to \$41,500

## Why Penwell Insurance?

### ***We live by our Vision and Value Statement. We will:***

- Always keep our client interests above our own.
- Embrace technology that allows us to better serve our clients.
- Treat everyone we encounter including each other, our clients, our carriers, and vendors as we would like to be treated.
- Continue to educate our clients and ourselves.
- Create lasting relationships.
- We feel family and community are important and when necessary, try to provide flexibility.
- We are an independent insurance agency.
- Potential for growth or change based on job satisfaction, desires, and capabilities.
- Get to know us by visiting our website and find us on Facebook. We are a small fun team that works hard together.

**How to Apply:** If you are enthusiastic about starting a career in the insurance industry and possess the qualities we are looking for, we encourage you to apply for this position. Please submit your resume and a cover letter outlining your qualifications and why you are interested in joining our team. If you see this on the Penwell Insurance Website, go to the "Contact" link and select "Secure Contact Form" to upload documents. Also, please tell us what your favorite time of year is.