

# PRODUCER JOB DESCRIPTION

## SUMMARY

Directly contributes to and supports sales goals of the agency or specialist department as communicated from the agent to meet short-term and long-term goals for agency growth. This includes new business, cross-sell opportunities, customer service, retention, and profit goals.

## CORE JOB DUTIES INCLUDE (BUT ARE NOT LIMITED TO)

- Must be licensed in Property & Casualty as well as Life, Accident and Health
- Solicits and writes new business for his/her specialist department
- Coordinates with the agent and/or Account Executive to provide assistance in determining proper coverage
- Field underwriting and rating for new accounts
- Maintains knowledge of new products and initiatives. Pursues a program for development of personal and business skills
- Actively solicits expiration dates from new clients and prospects
- Develops agency relationship with existing clients
- Meets the production requirements and goals assigned by the agent or agency manager
- Maintains monthly sales records and provides a copy for review to the agent and/or Account

## Executive

- Performs other duties as assigned

## CORE COMPETENCIES

**Business Results:** Ability to meet individual performance, metrics and goals **Drive and**

**Productivity:** Able to bring about great results from ordinary circumstances; prepares for problems or opportunities in advance; undertakes additional responsibilities and responds to situations as they arise without supervision. **Innovation:** Accepts innovation and improvement recommendations **Communication:** Acceptable verbal and written communication skills **Team**

**Work:** Accepts feedback when offered and works well with others

## PHYSICAL ENVIRONMENT

Required job duties are normally performed in a climate-controlled office environment.

## PREFERRED SKILLS AND ABILITIES

Four-year college degree required. Previous customer service experience highly preferred. Ideal candidate will have basic PC skills, basic math skills, strong analytical capability, conflict resolution skills, and strong verbal and written communication skills.

**Note: This position may require having the flexibility to work non-standard hours/shifts and having the ability to adhere to a structured schedule.**

# QUALIFICATIONS

The Agency Producer position has the potential to suit an array of qualifications. However, there are qualifications that have been identified by successful agents that can give you the best advantage in finding a successful Agency Producer.

First, the Agency Producer would preferably be a college graduate. Obtaining a college degree shows that they are hard-working and not afraid of a challenge. This may also show you that they are willing to develop and learn new things, which is critical when developing product knowledge as an Agency Producer.

Secondly, the Agency Producer must be willing to become licensed (in all lines). This is something that is covered in the interview. If they are willing to become licensed, then you also know that they are serious about a career in insurance.

The Agency Producer should be someone who is goal oriented. The Agency Producer position calls for someone who establishes goals and is constantly working hard to achieve them. These individuals usually plan ahead to map out the steps needed to achieve the goals. Additionally, these individuals will adapt their short-term goals when they face challenges in order to meet the long-term goals.

The next important qualification an Agency Producer should possess is confidence. The Agency Producer position calls for someone who is not afraid to reach out to someone they do not know, build rapport with a stranger, and make the prospective client feel comfortable talking with them. All of these elements require confidence. As the Agency Producer sells many lines of business, confidence is even more important. In order to successfully run appointments and engage in cross-selling to clients, confidence is the key.

Dedication and resilience are two of the most important factors to success. The Agency Producer will start out cold calling, so they must be dedicated to the job and resilient in the face of rejection. When an Agency Producer in training (essentially, a Marketer) is dedicated to cold calling, this is a demonstration of work ethic that is desired for an Agency Producer. The resilience displayed as they cold call demonstrates they can withstand rejection, and have the ability to focus on the positives, such as setting appointments or turning in quote sheets. Finally, if an Agency Producer is to be truly successful, it is extremely important they have strong communication skills, are friendly and personable. Because an Agency Producer will begin by reaching out to potential clients, it is important they communicate between the agency and prospect in a friendly and inviting way.

## **PREFERRED QUALIFICATIONS OF AN AGENCY PRODUCER RECAP**

- College graduate
- Must become licensed
- Wants a career in insurance
- Confident
- Dedicated/Resilient
- Personable
- Bilingual (if applicable to area)