

## **Personal Lines Agent**

OVD is searching for that rare hustler breed to join our Personal Lines Insurance team. If you are people-centric with a strategy-driven mindset, we would love to have a conversation!

As a PL Agent, you will lead and deliver in various areas, including :

### **Responsibilities of this career opportunity include, but are not limited to:**

- Set up new prospects and clients in the agency management system. Adding all referral sources and connections.
- Quote multiple carriers and determine the best plan with the best carrier for new clients.
- Present proposal to prospect, explaining coverages and pricing. Conduct sales meetings over the phone or in person.
- Customize insurance accounts to suit individual clients, often covering a variety of risks.
- Support a book of business by responding to client emails and calls promptly, answering coverage and billing questions, and resolving client and carrier issues.
- Foresee customers' insurance needs, such as policy renewal reviews or amending existing policies.
- Complete comparison quotes for current clients with all carriers at renewals when applicable.
- Using both carrier systems and agency management system - process policy changes, cancellations, new policies, rewritten policies, and claims.
- Follow insurance laws as well as multiple carrier guidelines and eligibility rules.
- Various projects assigned by management. These typically include agency management system clean-up or rolling out communication to clients of coverage upgrade options.
- No cold calling

### **Successful Candidates possess:**

- Property & Casualty Insurance License required; CISR & CPRM designations are preferred.
- Minimum of 4 years Independent Agency experience.
- Hold (or attain within six months of hire) Life License.
- Experience with auto, home, boat, and recreational policies.
- Experience using EPIC agency management systems is strongly preferred.
- Clear and effective communication and interpersonal skills.
- Proven project management experience and track record of adapting quickly and working autonomously.
- Strong critical thinking, problem-solving, and decision making.
- In-depth knowledge of laws and understanding of guidelines and regulations relevant to insurance.

If you are that rare hustler breed and eager to roll up your sleeve, we would love to talk to you! Apply now!