



JOB DESCRIPTION

DEPARTMENT: General Office

POSITION TITLE: Insurance Office Administrator

REPORTS TO: President

POSITION DETAIL: Full Time, Non-Exempt

POSITION SUMMARY:

The primary purpose of the Office Administrator is to be the Ambassador of Capricorn Insurance while welcoming and greeting people who telephone or visit the office. The Office Administrator position is expected to complete all associated tasks in a friendly, efficient, and professional manner.

EXPECTATIONS OF EMPLOYEE:

- Adheres to all policies, procedures of Capricorn Insurance
- Acts as a role model within and outside the organization
- Performs duties as defined, assigned and as workload necessitates
- Maintains a positive, respectful, and highly communicative attitude and approach
- Maintains a demeanor that creates positive team atmosphere
- Consistently reports to work prepared to perform duties of position
- Manages time well and meets organization productivity standards
- Communicates openly and regularly with Clients, management, and other team members

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Welcome and greet all visitors to the office by providing a welcoming atmosphere and help them with their appointment or questions.
- Maintain policy records, data entry, gather client information and schedule client appointments.
- Assist with office administrative tasks while learning the insurance industry.
- Consistent focus on agency productivity goals.
- Seek and foster relationships with clients.
- Create and update client profiles.
- Handle Client Intake processes, collect and process signed documents.
- Service existing policy holders with inquiries regarding claims and benefits renewals.
- Provide quality customer service.
- Answer telephones, handle client questions when appropriate or collect accurate information and/or messages, all in a professional and efficient manner.
- Review overnight messages distributing them to the appropriate staff. Prepares outgoing mail for pick up or, if critical, delivery to the post office.

ADDITIONAL DUTIES AND RESPONSIBILITIES:

- Assist as needed, with the entry of payments, invoices, or other electronic information.
- Sorts and distributes incoming mail, email, faxes, and texts.
- Prepare client declaration pages or other documents as requested.
- Miscellaneous copying, filing, office work, and maintenance of office machines.
- Light office cleaning.
- Other responsibilities and duties as assigned.

QUALIFICATIONS:

- High School diploma required; Associates degree preferred.
- 1 – 3 years' experience in an office setting, Insurance office experience preferred.
- Excellent customer service skills.
- Must possess exceptional phone etiquette and experience.
- Ability to learn and use multiple databases.
- Excellent organizational skills required.
- Proven ability to multi-task with frequent interruptions.

Pay Starts at a minimum of \$13 with a potential for higher starting pay based on education and relevant experience.