Account Manager – Insurance

Company Overview:

Penwell Insurance is a dynamic and growing insurance agency in business since 2005. We are dedicated to providing exceptional service and comprehensive coverage to our clients. As we continue to expand our operations, we are seeking a motivated individual to join our team as Customer Service Representative.

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.

Do You:

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

Requirements:

- 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.
- 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:

- Utilize Microsoft Office 365 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.
- Follow procedures, guidelines and policies.
- Answer phones, consult with clients regarding insurance coverage, policy changes, insurance reviews and provide appropriate recommendations.
- Comfortable working with multiple clients over the phone and handling numerous calls a day.
- Handle customer complaints, provide appropriate solutions or alternatives within the time limits, and follow up to ensure resolution.
- Obtain 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.
- 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 team with daily tasks.
- Assist with special projects and other duties as assigned by the team.

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
- Bonus opportunity
- Retirement Savings Plan with company match
- Opportunities for career advancement and professional development

Why work for the Penwell Insurance Agency?

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.