

**Title:** Personal Lines Processor

**Reports to:** Personal Lines Support Manager

**Job Summary:** As a Personal Lines Processor, you will enhance the agency’s sales strategy by managing tasks, optimizing processes, and maintaining CRM/AMS systems to ensure client satisfaction. You’ll support Client Advisors, ensure accurate documentation, and complete assigned projects to drive efficiency and revenue growth.

**Responsibilities:**

* **Reach your individual goal in timeliness and efficiency daily/weekly by completing all assigned tasks.**
* Complete assigned tasks in AMS/CRM promptly, adhering to the agency’s defined timeline.
* Keep detailed records of all client interactions in the AMS/CRM, ensuring thorough documentation that supports seamless client advisory processes.
* Ensure 100% weekly compliance with all GPB tasks, including reviews, questions, photos, and blog posts.
* Complete additional projects as assigned by leadership within given timeline per project.
* ***Follow established sales philosophy/strategy***
	+ Support the agency's sales philosophy by identifying account rounding opportunities to maximize client value and drive additional revenue.
	+ Maintain comprehensive knowledge of the insurance companies relevant to your role.
	+ Maintain thorough knowledge of each vendor's systems essential to your role.
* ***Follow client advisory process***
	+ Check tasks in CRM/AMS and complete all tasks that come in before 3 pm are completed the same day and anything after 3 pm is completed first the following day.
	+ Send all documents that need signed through Formstack within 10 minutes of receiving task.
	+ Move clients promptly to the appropriate pipeline stage, ensuring a positive customer experience.
	+ Update/Notate AMS/CRM immediately after each interaction.
	+ Utilize Heritage Playbook and follow all scripting, procedures and coverage guides.
	+ All tasks are zeroed daily in AMS/CRM.

**Standards:**

* Uphold the Agency's core values daily.
* Maintain a positive, respectful attitude with colleagues.
* Collaborate as a team to achieve department and company goals.
* Provide each customer with a review worthy experience.
* Protect the confidentiality of all sensitive information.
* Arrive on time ready to compete.
* Continuously expand knowledge of job-related programs.
* Stay informed on underwriting guidelines, insurance products, and agency procedures.
* Be honest, flexible, creative, and **teachable**.
* Communicate clearly and frequently.
* Utilize digital tools to work paperless.
* Attend and be on time to all virtual meetings.
* Attentively use interoffice communication daily.
* Notify the team ahead of planned time off.
* Prioritize family.

**Job Requirements:**

* Adequate & quiet workspace
* Good internet – 100Mbps down and 10Mbps up
* Internet backup plan (i.e. location or hotspot availability)
* Passes required agency training programs as needed (i.e. – insurance designation)
* Ability to work as a remote employee.
* Ability to multi-task and cope in a fast-paced work environment.
* Ability to learn and efficiently use multiple online systems.
* Provide (Agency) with the ability to inquire with the most recent employer.
* Provide (Agency) Insurance with verification of qualifications and competence.
* P&C licensed within 90 days (if agency/role requires)
* Be physically able to meet the demands of the job (i.e. see, hear, and talk on the phone). This role requires a high energy level and the ability to handle daily stress effectively.

**Feedback:**

* Every 90 days, you'll meet with your manager to discuss any challenges you're facing, share improvement ideas, and review the objectives detailed in your job description.
* Additional feedback will be given as needed.
* Each year you will receive a formal review.

**Disclaimer/Notice:** This job description is intended to outline key duties and responsibilities but does not encompass all tasks that may be required of the employee. Duties, responsibilities, and activities may be modified at any time, with or without prior notice.

**This job description has been approved by:**

**Manager:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Employee:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_