



CL Marketing Specialist / Insurance Systems Assistant I

Department: Insurance
Reports To: Systems Manager
Supervises: None

Job Description:

The CL Marketing Specialist/Insurance Systems Assistant I is responsible for marketing new business and renewal accounts for the agency. In addition, the CL Marketing Specialist/Insurance Systems Assistant I is responsible for various administrative functions, both of which require strict attention to detail.

Primary Job Functions may include:

- Supports and assists account executives and account managers with marketing new business and renewal business
- When necessary, prepares submissions and cover letters to companies and brokers ensuring accuracy, quality, and professional appearance for our offerings to the marketplace
- Becomes familiar with and utilizes the "submission" feature of AMS and attaches all communications of marketing efforts to the client file of the management system
- Travels to various branch locations to discuss marketing activities
- Completes supplemental applications and supplies any additional information that may be required
- Prepares proposals for account executives and account managers
- Retrieves P&C commission statements from company websites
- Processes incoming/outgoing mail
- Adds, edits, and maintains form letters in AMS360
- Keeps current on requirements for NC insurance license continuing education
- Assists with maintenance of AMS360 data base (by using reports to find errors, such as incorrect department, personnel, or customer statuses)
- Orders and tracks supplies for the Boone branch
- Follows and is familiar with Procedures Manual
- Adheres to all company and compliance policies and procedures

Minimum Qualifications

- High School Diploma or Equivalent
- Insurance license required
- Detail-oriented and independent self-starter
- 5 years of insurance experience in an independent agency environment
- Experience working in agency management systems
- Excellent interpersonal, office, communication, and public relation skills
- Excellent knowledge of windows and MS Office programs
- Good math and verbal skills

Employees are expected to perform other duties as assigned and directed by management. Job description and duties may be modified when deemed appropriate by management.