

Position Title: Producer (Sales)-Commercial Insurance, Truex Insurance

Status: Full Time, Exempt

Reports to: Company Owners

About Truex: Located in Stockton, CA, Truex is a dynamic, independently owned insurance broker specializing in Business / Commercial, Personal, Employee Benefits, Life, and Health. Our business model is built on developing genuine, life-long relationships with our clients, and on providing excellent customer care at all times. Truex employees are the best at helping people protect what is most important to them; their family, home, business and health.

Truex actively nurtures a culture of mutual respect, excellence, support, and professional development. We work interdependently in all we do, and rely on the input and expertise of every team member. While maintaining a high standard of professionalism, we do insist on having fun.

Truex offers a competitive introductory salary designed to sustain the Producer while he/she builds a book of business, then transitions to full commission. Employment includes a complete benefits package: medical, dental, vision, LTD, life insurance, 401(k) and paid time off. Future partnership opportunities are also available for outstanding performers.

Summary: This is a full time, commission based sales position. The Commercial Producer attracts, maintains, and services businesses by offering a wide variety of insurance products, risk management expertise, and service.

#### Key Responsibilities:

The successful Commercial Producer will:

- 1) Prospect, meet, and confer with prospective clients to gather information, analyze needs, form solutions, and present proposals for the sale of commercial insurance products.
- 2) Connect with existing clients in advance of annual renewal to explain coverage, assess ongoing needs, form solutions, and present proposals. Identify, pursue, and close account rounding opportunities.
- 3) Educate and empower clients to manage risk.
- 4) Have the ability to explain coverage features, advantages, and disadvantages in a clear and engaging manner.
- 5) Cultivate new relationships with business owners in the community, and promote the agency.
- 6) Identify and assess various carrier products in order to select the best type of coverage, at a competitive price, for the client.
- 7) Develop amicable, productive relationships with underwriters and keep abreast of emerging industry information, new products, coverage and technology.
- 8) Work productively with Account Managers to service client accounts in a timely, efficient, and effective manner.
- 9) Help to develop a sound relationship between clients and their Account Manager in order to facilitate day-to-day service activities.

- 10) Stay informed of all claims, and other client issues, becoming involved in their resolution when appropriate.
- 11) Provide excellent customer service at all times to ensure high client retention.
- 12) Set and achieve annual sales objectives.
- 13) Attend weekly sales meetings.
- 14) Follow agency E & O guidelines.
- 15) Perform other administrative tasks appropriate to their role.

#### Knowledge, Skills and Abilities:

##### The successful Commercial Producer:

- 1) Will have a proven record of pursuing and closing commercial insurance sales.
- 2) Must be a highly energetic self-starter, and a life-long learner, able to define problems, collect data, establish facts, and draw conclusions.
- 3) Will have a proven ability to interpret an extensive variety of data, think critically, and consider short to long term alternatives.
- 4) Will have a thorough understanding of business / commercial property and casualty, coverage. Knowledge of personal, employee benefits, health, and life lines a plus.
- 5) Will work cooperatively and collaboratively with Staff at all levels, and is dedicated to a respectful and collegial work environment.
- 6) Excellent interpersonal, verbal and written communication skills.
- 7) High attention to detail and an ability to work successfully on several projects concurrently.
- 8) Excellent time and task management, and organizational skills.
- 9) Facility with a PC environment, and competence with Microsoft Office Suite. Ability to master Agency Management Software (AMS 360).
- 10) Ability to sit and work at a computer for extended periods of time, type, move about an office environment, and to lift up to 20 pounds occasionally, with reasonable accommodation as needed.

##### Other Requirements:

- 1) High School diploma.
- 2) College education or equivalent insurance experience preferred.
- 3) Must hold a current California Resident Insurance Producer for Property and Casualty license.

##### Working Conditions:

- 1) Fast-paced, multi-tasking, sales environment requiring ongoing learning and complex problem solving.
- 2) Extensive client contact requiring frequent car travel in and around the Central Valley.

##### General:

- 1) This job description is intended to describe the level of work required of the person performing the job.
- 2) Essential functions are outlined; other duties may be assigned as needs arise or as required to support the agency's essential functions.

- 3) This description is not intended as a contract and is subject to unilateral change and revision by management.
- 4) Any written contractual agreements will supersede this job description.
- 5) All requirements may be modified to reasonably accommodate physically or mentally challenged employees.