



POSITION TITLE: Producer, also known as an Agent, Broker (Commercial Broker, Executive Broker, Senior Commercial Broker) or Insurance Representative

REPORTS TO: Director of Business Development

PRIMARY OBJECTIVE:

CRS is seeking a goal-oriented and ambitious Producer to join our growing commercial insurance salesforce. With energetic agency management and ownership, working at CRS means prospecting based on value and relationships. CRS Producers meaningfully contribute to our team-based service approach with the highest degree of integrity and professionalism. As growth and profitability with CRS progress, residual income is one of the many attractive aspects that lends itself to limitless income opportunity, a flexible schedule, and growth within the company.

The Producer will prospect new accounts, sell CRS Insurance Brokerage products to new and existing accounts, and service CRS customers with the highest degree of integrity and professionalism. The producer will continually grow a book of business and contribute to the growth and profitability of CRS Insurance Brokerage with quality business.

POSITION QUALIFICATIONS/BEHAVIORS:

- College degree is required
- Minimum five years of insurance or successful business-to-business sales experience
- Effective prospecting, negotiating, and closing skills required
- History of meeting and exceeding sales production goals
- Ability to identify viable prospects and fill and manage pipeline from suspect through close
- Skilled in navigating complex sales cycles with multiple decision-makers and influencers
- Demonstrates an attitude of lifelong learning and brings a history of competing and winning
- Exhibits traits of resilience, focus, and discipline in building and managing a productive sales pipeline
- Adheres to CRS Code of Ethics and Core Values

DUTIES & RESPONSIBILITIES:

Know and follow CRS Insurance Brokerage procedures, using the agency management system effectively and as instructed. Know CRS Insurance Brokerage markets and their appetites and personnel.

- Meet established minimum revenue threshold as established by management
- Identify, develop and secure new business for CRS
- Continual prospecting (cold calls, telemarketing, referrals, etc.)



- Develop comprehensive insurance plans for prospects and clients
- Assist in servicing those accounts sold, when needed
- Maintain positive customer relations, conduct regular client stewardship meetings, completing the CRS Customer Questionnaire and Risk Profile documents
- Coordinate and deliver the renewal to the client
- Complete new applications and updating renewal applications on the system
- Market accounts to Carriers
- Prepare and finalize proposals
- Present proposals to prospects and clients securing their business
- Monitor account receivables, collecting receivables when necessary
- Monitor outstanding audits and collect, when necessary
- Negotiate premiums with underwriters
- Work well with CRS team and staff, assisting as needed
- Be competent on CRS automation system and follow inputting procedures
- Obtain and maintain the CIC, CRM or CPCU designations, or other designations as required by management
- Meet submission count, annual sales and retention goals as established by management
- If annual sales goal is not achieved, the renewal commissions will be changed. If goals are not met, you may be subject to further disciplinary action, up to and including voiding of the Producer Agreement and/or termination
- Attend and collaborate in weekly sales meetings
- Utilizing the CRM (Sales Force) as instructed
- Other duties as assigned

This Job Description is not a complete statement of all duties and responsibilities comprising this position. Job duties are considered minimum requirements for the position.

**Your signature below acknowledges that you have received and read the above.

EMPLOYEE'S SIGNATURE _____

DATE _____