

## Customer Service Advisor

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**Job Purpose:** Do you enjoy helping other people get what they want? Do you have the heart of a teacher? Do you naturally take ownership of your projects and enjoy digging into the details to make sure what you're doing is being done accurately? If so, keep reading...

Ovation Insurance is looking for a licensed customer service advisor. Ovation is a small but quickly growing insurance agency in Fort Wayne, IN. The candidate will play a key part in the success and growth of the agency by providing service support to both the clients and the sales team of Ovation Insurance.

### Skills/Qualifications:

- Must have or acquire active Ohio and Indiana insurance licenses
- Very comfortable with prospecting conversations
- Exceptionally strong attention to detail
- Articulate note taker and able to concisely document conversations and transactions
- A good personality – doesn't take life too seriously, works well with others, believes in having fun, doesn't allow 'bright and shiny' to distract them
- Willing and able to get in front of the camera on a regular basis
- Natural desire to help customers and prospects
- Willing to follow processes and instructions
- Must be coachable and trainable
- Comfortable with using multiple forms of social media and willing to post regularly
- Basic property and casualty product knowledge
- Extremely organized and detail-oriented
- Ability to multi-task in a fast paced environment
- Extremely comfortable using and learning new technologies

### Scope/Key Responsibilities:

- Schedule and maintain calendar appointments via Google Calendar and Calendly to ensure appointments don't get booked when you are unable to take one.
- Work with insurance carrier websites and comparative raters to quote, bind and issue new business policies.
- Delegate tasks for e-signatures and application handling to your service team.
- Maintain relationships with current clients and build referral pipeline.
- Send video proposals via [www.ovationinsure.com](http://www.ovationinsure.com).
- Offer the best and most intelligent insurance possible – every time.
- Make the process as simple for the client as possible.
- Make your relationship with your co-workers and Ovation Insurance management as simple as possible with clear communication.
- Communicate ahead of time when you plan to take off.
- Make the most of every opportunity you are given.



- Communicate via VOIP phone, text and email using dedicated phone number and/or technology.
- Follow Ovation Insurance's guidelines and operational processes
- Obtain underwriting approval by completing application for coverage
- Provides continuing service to customers by thoroughly completing service request, customer policy reviews, and courtesy follow-up calls
- Updates job knowledge by participating in educational opportunities; reading professional publications; maintaining personal networks; participating in professional organizations
- Enter all data points into agency programs and software to ensure accurate data, including contact information, policy and quoting information, and all correspondence

**Pay/Benefits:**

Ovation Insurance provides Base Compensation, Enhanced Pay, and special incentives that are among the best in the business. In order to simplify the process, the agency's basic compensation is linked to education completion, and enhanced pay is linked to consistently properly completing revenue producing tasks.

Enhanced Pay is an additional portion of a staff member's hourly pay amount that is not guaranteed and is based on consistent performance, completion, and validation of agency processes and revenue producing tasks.