

## **Administrative Assistant**

Position Title: Administrative Assistant

Reports to: Agency Principal

### **A. SUMMARY**

Creates a positive first impression on behalf of the agency. Directs clients to the proper person in a professional, accurate, and timely manner. Performs clerical duties as assigned. Assists Customer Service Representatives and Agents by processing changes and renewals, performing rating and/or data entry, making calls to clients or company representatives, or by assisting in any other areas as directed. Provides assistance and administrative support for all areas of the agency.

### **B. Essential Job Functions**

1. Acts as office receptionist. Answers all phone calls within three rings.
2. Handles incoming calls in a friendly and courteous manner, and provides assistance and information as required, and connects caller with desired party.
3. Answers client inquiries if possible or directs the question to the person best able to respond.
4. Records and forwards accurate messages to agency staff with pertinent information.
5. Maintains account files, including scanning and copying, and purging of files.
6. Prepares mailings and delivers mail to post office when required.
7. Reviews, scans, and routes incoming mail, faxes and agency documents accordingly.
8. Types material and proofreads all typewritten material to ensure error-free content.
9. Processes policy change requests on the same day as requested.
10. Maintains working knowledge of all company change procedures.
11. Receive client payments, direct notice of cancellations and call pending cancellations.
12. Process paperwork assigned by Customer Service Representatives as directed.
13. Seeks advice from CSR with any problems with their accounts.
14. Maintains working knowledge of all rating products and processes.
15. Perform other functions as assigned by management.

### **C. KNOWLEDGE, SKILLS, AND ABILITIES**

Must be organized, with demonstrated skills for effective verbal and written communication. A high level of familiarity with business operations in a corporate setting is key, and candidates should have a strong understanding of agency systems. Must be highly knowledgeable about the mechanics and applications of word processing programs.

### **D. WORKING CONDITIONS/ENVIRONMENT**

Fast-paced multitasking office environment. Employees are provided a dedicated workstation with basic ergonomic setup features, such as an ergonomic keyboard and mouse, dual monitors, and an adjustable chair. Workstation accommodations and adjustments are provided upon request and evaluation.

### **E. PHYSICAL REQUIREMENTS**

Must be physically able to work a minimum of 40 hours per week in the office. The employee is regularly required to see, hear, and project voice well enough without amplification. There is frequent need for the employee to stand, sit, walk, use repetitive small motor activity, use hands and fingers, and reach with hands and arms. The employee is occasionally required to lift and carry up to 30 pounds; to stoop, kneel, crouch, or crawl, and to ascend and descend stairs. This position requires a high-energy level and ability to handle stress-related situations on a daily basis. The employee may be required to drive and travel unaccompanied in diverse weather conditions.

### **F. OTHER REQUIREMENTS (PREREQUISITES)**

Ability to use a personal computer, calculator, agency automation system, and demonstrate proficiency in various software programs, including but not limited to all Microsoft Office software suite programs.

Candidate must satisfactorily complete pre-hire employment assessments and maintain a satisfactory driving record. Candidate may be asked to submit to a drug and/or alcohol screening. A civil and criminal history background check will be performed at the company's expense. Physical attendance is required at regular and/or mandatory company meetings. Employees are encouraged to pursue relevant professional designations; however, this is not required.

### **G. APPLICABLE LAWS**

This employer complies with applicable federal, state and local laws governing nondiscrimination in employment in every location in which the company has facilities. These laws include, but are not limited to:

- ADA: The employer will make reasonable accommodations in compliance with the Americans with Disability Act of 1990.
- EEO: This is an equal opportunity employer. The agency provides equal employment opportunities to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability, or genetics.
- OSHA: The employer will comply with OSHA requirements as applicable.

**H. CLOSING**

This job description is not intended as a contract and is subject to unilateral change and revision by management with or without notice at any time. Any written contractual agreements will supersede this job description.