

Cresco Insurance Agency

Agency Manager

Position Summary

Responsible for the leadership and management of CIA Insurance Agency. Will develop sales agents, office staff, goal setting, business development, and assures the overall profitability of the agency. The Agency Manager will also lead strategic planning, and business growth and retention. This person sells the Agency's products and services using technical, organizational, and customer knowledge to influence customers and assist them in applying the products/services to their needs resulting in revenue generation.

Responsibilities

As Producer:

- Actively prospects, targets, qualifies, presents and close sales for fee income products:
- Maintains confidentiality concerning customers and their business/personal financial affairs.
- Coordinate purchases transactions and servicing of all products per current designated procedures.
- Is accountable for a work schedule that balances time in and out of office in a way that maximizes opportunities for sales results and customer service.
- Keeps all securities and insurance licenses current. Will be asked to obtain and retain Iowa Life Insurance License and NASD series 7 and 66 or 63 securities licenses as well as P & C and Commercial Lines.
- Provides friendly, courteous, competent service to clients, the public and community; conducts these relationship in a manner that will enhance overall marketing efforts and image of Agency.

As Division Head:

- Researching, developing & maintaining long & short range sales & marketing plans including:
- Oversees all insurance services activities regarding clients, operations, budget, procedures, company lineup, and business development plan.
- Stays abreast of all regulatory and compliance aspects of the appropriate supervisory and regulatory agencies for securities and insurance products, acts in accordance with them and assures that department follows them.
- Manages and directs administrative functions pertaining to the effective and productive operations of CIA.
- Prepares agency reports accurately and on time for the Management Committee and the Board of Directors.

Supervisory Responsibilities:

- Directly supervising all employees of CIA. Responsibilities include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.
- Responsible for coordinating staff development- product knowledge, sales training.
- Ensure staff is scheduled for optimum coverage, even distribution of the workload, and appropriate project delegation.
- Professional representative of the agency to deliver effective communication of employee announcements, work procedures, and staffing issues through their direct reports and the branch

locations. Provides the information individuals need to know to do their jobs and to feel good about being a member of the team, unit, and organization.

Requirements

- High school diploma or general education degree (GED); five or more years of experience in providing investment services as a stable and progressively responsible sales professional, financial planner, or banker developing business and establishing long-term relationships with clients; or equivalent combination of education and experience.
- Must have an executive presence, extraordinary interpersonal skills, a strong team orientation and resiliency.
- **PREFERRED:** Current license in specific insurance discipline(s) which include Iowa Life Insurance License and NASD series 7 and 66 or 63 securities licenses as well as Property & Casualty and Commercial Lines.
- Ability to read and comprehend simple instructions, short correspondence and memos.
- Ability to effectively present information in one-on-one and small group situations to customers, clients and other employees of the organization.
- Must be able to operate a multi-line telephone, copy and fax machine.
- Experience with Outlook, Excel, WORD and MS Office software programs.
- Must be able to use the agency management software, TAM, in order to satisfy the positions job requirements.
- Position requires the ability to work before or after normal business hours to attend various employee meetings and training sessions.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.

Benefits

We offer a competitive salary and comprehensive benefits program, including medical, prescription drug, dental, vision, 401k with company match, life insurance, paid time off, incentive plan, and profit sharing.

Cresco Insurance Agency is an Equal Opportunity Employer of women, minorities, protected veterans and individuals with disabilities. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.