

**Oklahoma Farm Bureau & Affiliated Companies
Job Description**

Job Title: Commercial Rate Clerk- Auto		Department: Commercial Lines Underwriting	
Accountable to: Underwriting Manager		Issued: 08/2018	Revised: 7/2021
Grade: 7	Type of position: <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Intern <input type="checkbox"/> Seasonal	FLSA: <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Nonexempt	Position Details: <input checked="" type="checkbox"/> Individual Contributor <input type="checkbox"/> Supervisor/Manager (direct reports)

Primary Purpose: Quote Rates for Commercial Auto and Special Vehicle and provide administrative support to the Commercial Underwriting department.

Essential Duties and Responsibilities include the following. Other duties may be assigned.

1. Quote rates for agents for commercial risks using data provided regarding the individual exposure and applying the correct premium rate computations.
2. Assist Agents on innovations to input policy information into the computer system.
3. Review the quote before sending back to agent
4. Order MVR's and review and update mortgages, and agents.
5. Provide policy service support to agents, insureds and other interested parties, primarily by telephone and email.
6. Provide administrative support for the Commercial Underwriting, as needed.

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

1. Problem solving- Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully.
2. Customer Service- Manages difficult or emotional customer situations; Responds promptly to customer needs; Responds to requests for service and assistance.
3. Oral communication- Speaks clearly and persuasively in positive or negative situations; Listens and gets clarification; Responds well to questions; Participates in meetings.
4. Written communication- Writes clearly and informatively; Edits work for spelling and grammar; Varies writing style to meet needs; Able to read and interpret written information.
5. Business Acumen- Understands business implications of decisions; Aligns work with strategic goals.
6. Diversity- Shows respect and sensitivity for cultural differences; Promotes a harassment-free environment.
7. Ethics- Treats people with respect; Works with integrity and ethically; Upholds organizational values.
8. Organizational Support- Follows policies and procedures; Completes administrative tasks correctly and on time.
9. Judgment- Displays willingness to make decisions; Exhibits sound and accurate judgment; Includes appropriate people in decision-making process
10. Planning/Organization- Prioritizes and plans work activities; Uses time efficiently.
11. Professionalism- Approaches others in a tactful manner; Treats others with respect and

- consideration regardless of their status or position.
12. Quality- Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality. Quantity- Meets productivity standards; Completes work in a timely manner.
 13. Adaptability- Adapts to changes in the work environment; Able to deal with frequent change, delays or unexpected events.
 14. Attendance/Punctuality- Is consistently at work on time; Ensures work responsibilities are covered when absent.
 15. Dependability- Follows instructions, responds to management direction.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education/Experience

High school diploma or general education degree (GED); and one to three months related experience and/or training; or equivalent combination of education and experience.

Insurance classes are helpful, but not required.

- **Language skills**
 - Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to customers, clients and other employees of the organization.
- **Mathematical skills**
 - Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.
- **Reasoning ability**
 - Ability to apply common sense understanding to carry out detailed, but uninvolved written or oral instructions. Ability to deal with problems involving few concrete variables in standardized situations.
- **Computer skills**
 - Individual should have knowledge of computers and computer systems including hardware and software.
- **Other Skills and Abilities**
 - 10-Key, light typing, telephone, and basic business skills are required.
- **Other Qualifications**
 - Employee is expected to maintain regular attendance.

Physical Demands

The physical demands described here are representative of those that must be met by an

employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit; use hand to finger, handle, or feel and talk or hear. The employee is frequently required to stand; walk and reach with hands and arms. The employee is occasionally required to stoop, kneel, crouch or crawl.

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 worker is regularly in a typical office environment and is not subject to adverse environmental conditions. The noise level in the office environment is usually moderate.