

Oklahoma Farm Bureau & Affiliated Companies Job Description

Job Title: Brokerage Associate		Department: Brokerage	
Accountable to: Brokerage Supervisor		Issued: 04/2014	Revised: 7/2022
Grade Level: 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: Rate, set up, and maintain insurance policies.

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

1. Collect rate information from agents regarding excess/surplus lines or Brokerage type insurance; make sure all applications are complete; get complete applications to companies; call agents back with quote.
2. Key data into the computer system regarding new business, changes, and renewals for Brokerage policies and maintain spreadsheet program.
3. Figure renewals for Brokerage policies.
4. Mail brokerage policies to insureds, mortgage companies, and agents. Mail additional policy items, such as, declarations, endorsements, renewals, certificates, etc.
5. Assist in underwriting Brokerage policies, if necessary. Assist others in the department, as needed.

Competencies

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

1. Customer Service - Responds promptly to customer needs; Responds to requests for service and assistance.
2. Oral Communication - Speaks clearly and persuasively in positive or negative situations; Listens and gets clarification; Responds well to questions; Demonstrates group presentation skills; Participates in meetings.
3. Written Communication - Writes clearly and informatively; Edits work for spelling and grammar; Varies writing style to meet needs; Presents numerical data effectively; Able to read and interpret written information.
4. Business Acumen - Understands business implications of decisions.
5. Diversity - Shows respect and sensitivity for cultural differences; Promotes a harassment-free environment.
6. Ethics - Treats people with respect; Works with integrity and ethically; Upholds organizational values.
7. Organizational Support - Follows policies and procedures; Completes administrative tasks correctly and on time; Supports organization's goals and values.
8. Judgment - Displays willingness to make decisions; Exhibits sound and accurate judgment; Makes timely decisions.
9. Planning/Organizing - Prioritizes and plans work activities; Uses time efficiently.
10. Professionalism - Approaches others in a tactful manner; Treats others with respect and consideration regardless of their status or position.
11. Quality - Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality.
12. Quantity - Completes work in timely manner; Works quickly.
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 and on time; Ensures work responsibilities are covered when absent; Arrives at meetings and appointments on time.
15. Dependability - Follows instructions, responds to management direction; Takes responsibility for own actions; Completes tasks on time or notifies appropriate person with an alternate plan.

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 and/or Experience

High school diploma or general education degree (GED). One to three months related experience and/or training; or equivalent combination of education and experience. Insurance class helpful but not required.

Worker is expected to participate in continuing education program(s) and/or participate in cross-training for other lines of business, if needed.

- **Language Skills**
 - Ability to read and interpret documents such as business documents, procedure manuals and instructions. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of 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 a few concrete variables in standardized situations.
- **Computer Skills**
 - Computer knowledge required. Knowledge in Agency Management Systems desirable.
- **Other Skills and Abilities**
 - 10-Key and light typing skills required. Excellent communication and telephone skills is necessary.
- **Other Qualifications**
 - Worker 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 hands to finger, handle, or feel and talk or hear. The employee is frequently required to reach with hands and arms. The employee is occasionally required to stand; walk and 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 exposed to adverse environmental conditions. The noise level in the work environment is usually moderate.