

Part Time Office Assistant (OA)

The Abbott & Fillmore Agency, Inc. has an opening for a part time job. Hours would be in the afternoon (4:00 to 5:30 pm M-F. Hours could possibly increase depending on our need and employee's aptitude and desire.

A brief list of duties is listed below.

Pay Range: Pay will range from near minimum wage to more depending on experience, education, etc.

Partial List of Duties - Summary

(Not in any particular order) Printed 4/13/2010 6:32 PM

Note: This job does include cleaning such as toilet cleaning, dusting, vacuuming, raking leaves, shoveling snow, etc. It is also very heavy in computer work. Need to be very comfortable with computer. So if you are unable or unwilling or would be miserable doing such things, please don't apply.

- 1) * Setting up new client files and policies in our Agency Management System (called Nexsure) including creating appropriate follow-up actions on new policies written
- 2) * Adding, deleting, and updating client information on computer
- 3) * Handling processing of Titan business and other policies that don't download into system automatically.
- 4) * Filing
 - a. Mostly electronic, but still small amount of paper filing too.
 - b. Scanning Documents and electronically routing and filing properly
 - c. "Attaching" to client's file in "Nexsure"
 - d. Filing items contained in and cleaning up the "To Be Filed" folder.
- 5) * Close out our cash drawer and "daily cash sheet"
- 6) * Close out Allstate at same time as completing "daily sheet"
- 7) * Preparing outgoing mail and taking it to post office
- 8) * Daily end of day check of VISA machine
- 9) * Sweep sidewalk (light snow and dirt etc) along entire front of building and to the corner
- 10) * Cleaning (toilets, sinks, dust, vacuum, etc.)
- 11) * Prospect mailings and stuffing envelopes.
- 12) * Monthly mailing to people who have recently moved to the area
- 13) * Watering plants Mondays & Thursdays
- 14) * Weekly check of Town Crier for newborns and sending of mailing to Parents & Grandparents
- 15) * Monthly processing of "lost clients" report

- 16) Answering phone.
- 17) Taking information over phone and counter for quotes.
- 18) Waiting on customers as needed.
- 19) Running insurance quotes on computer. This includes running quotes and then saving pdf files and putting summary in Word file in order to prepare an email with quotes to prospects
- 20) Emailing quotes and quote packages.
- 21) Helping with Internet quotes
- 22) Making sure that all Non-automated web quote requests get input into quote request program.
- 23) Misc other duties

* Asterisked items are the first, main things that job will encompass. May expand to include the other, non-asterisked items.

NOTE ON DRESS CODE: Abbott & Fillmore Agency is a highly professional service entity. Therefore, it is important that employees look and act professional. All employees, including part time high school students, need to wear "nice" clothes. Jeans are NOT acceptable.