



Receptionist

Position: Receptionist

Location/ Department: Panama City / Administrative

Supervisor Name and Title: Executive Assistant to the President of PFI

Supervises (Number of employees supervised): N/A

FLSA Status: Exempt (exempt from overtime) Non-Exempt (non-exempt from overtime)

Job Summary:

Provide prompt and professional assistance to call-in and walk-in customers. Manage incoming phone calls and walk-in customers. Direct customers to the appropriate employee when their request cannot be handled at the reception desk. Works under the direct supervision of the Personal Lines Manager, and assists with data entry tasks, routine filing, and clerical support as necessary. Maintains the utmost confidentiality in dealing with employee records and business information. Incumbent is expected to have excellent attendance and communication skills, possess the ability to build lasting business relationships, and exhibit professionalism.

Essential Job Duties and Responsibilities:

- Answer incoming phone calls in a prompt, professional and friendly manner
 - The Receptionist sets the tone of the customer's experience with the agency
 - Assists callers when in the scope of her responsibilities or transfers the caller to the appropriate employee for assistance
- Assist walk-in customers with the same professionalism and friendliness provided to incoming callers.
 - Assists customers when in the scope of her responsibilities or arrange for the customer to meet with the appropriate employee for assistance
- Process payments from customers and document receipt in TAM
- Process the mail daily and distribute to employees
- Assist Personal Lines Department with data entry task that include:
 - Entering Applications into TAM, updating any information in the client detail screen, and billing screen as directed
 - Update the PL Binder Log and attach Applications in TAM
 - Assist with filing and other policy related data entry as directed – to include assisting with renewals and documenting those renewals in TAM as necessary or assigned
- Ensure the lobby is kept neat and in good order
- Assist with other duties as assigned

Knowledge, Skills and Abilities (KSAs):

- Operate Phone System, multi-line switch board, and other means of communication to include outlook and other Microsoft Office Programs
- Operate within Applied TAM system
- Ability to clearly communicate with customers
- Ability to organize tasks, prioritize, and complete tasks in a timely manner
- Work under multiple time constraints
- Operate office machinery



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Education and Experience:

- High School Diploma or Equivalent required
- 2-3 years’ experience as a Receptionist in a professional office required
- Active 4-40 License preferred, or ability to obtain within first 90 days of employment

Physical Demands:

- Must be able work with a computer for a minimum of 7 hours daily either standing or sitting
- Must be able to read printed materials and computer screen with or without MS or other software accessibility functions
- Must be able to effectively communicate in e-mail, by phone, or in person during the workday

Review: This job description will be reviewed annually during your annual performance review. Your inputs will be considered, and you are encouraged to submit any changes that would make this document more accurate. Updated job descriptions will be acknowledged by employee and supervisor.

AT-WILL EMPLOYER STATEMENT & ACKNOWLEDGEMENT OF RECEIPT OF JOB DESCRIPTION

Peoples First Insurance Services, LLC is an “At-Will” employer. This means that either the employee or the Company is free to end the employment relationship at any time, for any reason, with or without cause and with or without notice. While positive performance evaluations, commendations, pay raises and longevity of employment are desired objectives, they do not change or alter the At-Will employment relationship.

I _____, do hereby acknowledge receipt of Peoples First job description for the position described above. I have read, understand and am able to perform the duties, responsibilities, and essential job functions of the position with or without reasonable accommodation.

Employee Signature: _____ **Date:** _____

Supervisor Signature: _____ **Date:** _____