1. Interviewed clients and impacted individuals, determining details about accident and claim parameters to provide best advice for specific situations.
2. Provided clients with information on audit classifications, settlements and computations.
3. Tailored insurance plans to support client needs and establish sense of trust among community members.
4. Explained advantages, features and disadvantages of various policies to promote sale of plans, boosting overall sales [Number]%.
5. Kept detailed records on individual insurance claims and incorporated into detailed client files.
6. Determined financial needs by assessing existing coverage and aligning new products and services with long-term goals.
7. Enhanced insurance agency reputation by accommodating new and different requests and by exploring opportunities to add value.
8. Spent ample time with each customer, verbally reviewing and explaining documents for client comprehension.
9. Created sources for continuous client referrals within community and with businesses using [Skill] and [Skill].
10. Scheduled fact-finding appointments and consultations to determine client needs and overall financial situations.
11. Attended seminars, meetings and educational programs to stay abreast of evolving needs of insurance industry and client base.
12. Conducted prospective client interviews to assess needs, policy requirements and financial resources for best plan options for individuals.
13. Worked to accommodate new and different insurance requests and explored new value opportunities to optimize insurance agency reputation.
14. Acted as emotional support for customers experiencing catastrophic situations.
15. Supported customers in insurance application completion while liaising between company and client.
16. Displayed consistent, positive attitude towards customers, peers and other personnel, even during high-stress situations.
17. Responded to customer calls within [Number] hours to swiftly resolve issues and answer questions.
18. Performed administrative tasks, including policy renewal and record retention.
19. Inspected insured [Type] personal property to determine insurance risk, balancing client need against company parameters.
20. Processed [Number] invoices each [Timeframe] and mailed documentation to clients.