



JOB DESCRIPTION

JOB TITLE: Operations Manager
DEPARTMENT: Adams Insurance Advisors
REPORTS TO: Agency Manager
SUPERVISES: Customer Service Representatives
FSLA Status: Exempt

POSITION SUMMARY: Responsible for oversight of all aspects of branch operations and administration, including Servicing staff, IT, HR, Claims, and Administrative Support. Responsible for establishing, implementing, monitoring, and achieving Operations goals. Continuous development, implementation, improvement and monitoring of departmental workflows and procedures (shared responsibility with any Department Managers/Supervisors).

PRIMARY ACCOUNTABILITIES AND RESPONSIBILITIES: (95%)

1. Recruit, hire, train, develop, monitor, manage, and reward agency CSR staff.
2. Develop effective agency operations, technology, and profitability goals, and monitor their effectiveness.
3. Work with CSR staff to develop and establish individual goals that are tied to global agency goals and identify resources to help them achieve their goals.
4. Hold regular meetings with departments for which Operations Manager is responsible, to ensure agency operational and profitability goals are achieved, further staff members' acumen, and monitor and measure their progress.
5. HR Management for agency, including:
 - Involvement and oversight of agency hires and terminations.
 - Participate in all agency staff performance reviews.
 - all agency personnel files according to EEOC standards, as well as other state and federal rules and regulations.
 - Serve as liaison to EPLI attorney (as needed).
 - Responsible for continuous development, implementation, improvement, and monitoring of Employee handbook (usually updated by EPLI attorney annually).
 - Coordinate all HR issues, including vacation schedules, sick leave, new employee orientation, benefits, etc.
6. Work with the Sales Manager to support sales and operations efforts.
7. Participate in and/or direct any special projects at the Agency Manager's request.

SECONDARY DUTIES AND RESPONSIBILITIES: (5%)

1. Other duties as may be assigned.

The statements contained in this job description describe the general nature and level of work being performed by the person accepting this role. "Secondary Duties and Responsibilities" are considered incidental or secondary to the overall purpose of the job. This job description does not state or imply the only duties and responsibilities assigned to this job. Employees holding this job will be required to perform any other job-related duties requested by management. All job requirements are subject to possible modification to reasonably accommodate individuals with a disability.

MANAGEMENT SPECIFIC:

1. Ensures that sales employees have clear goals and responsibilities consistent with Agency culture and core values.
2. Supports the ongoing implementation of the Performance Management system, utilizing tools and attending training sessions.
3. Works with direct reports to set performance standards that are specific and measurable.
4. Supports, coaches and mentors teams.
5. Provides specific performance feedback, positive and corrective, as soon as possible after the event and formally at least once a year. Deals firmly and promptly with performance concerns.

TEAM/COMMITTEE ASSIGNMENTS: (TBD)

- Weekly Team Meeting
- Monthly Huddle Meeting
- Weekly Check-in Meetings

ROLE QUALIFICATIONS:**Education**

- College degree required.
- In addition, post graduate insurance-specific education: Appropriate State license(s). Knowledge and experience in total, overall insurance agency management – for all departments – planning, training, and administration.

Experience

- Insurance-specific agency departmental knowledge and experience highly desirable (for instance, Commercial Lines & Personal Lines department management).
- Demonstrated, measurable success in agency operations management.

Other Skills/Characteristics

- Leadership, analytical and decision-making qualities are critical. Must have the ability to create and maintain an environment where agency and individual goals can be met.
- Excellent verbal and written communication skills, and strong understanding of agency technology tools (MIS, document management, phone system, carrier proprietary systems, Word, Excel, etc.)

Performance Measures

- Achievement of agency operational goals – increasing agency capacity and profitability resulting from effective and efficient operations
- Reduction of E&O exposure resulting from use of proper procedures

By signing below, I acknowledge I have read and understand the Job Description above.

Employee Signature _____ Date _____