**Position Title:** Insurance Services Specialist

**Department:** Greylock Insurance Agency

**Work Arrangement:** In- Office

We are guided by our IDEA principles – Inclusion, Diversity, Equity, and Accessibility – to support a workforce that reflects our community.  Our principles support Greylock’s mission and our goals of building a diverse workforce – reflecting multiple identities – and supporting the diverse communities we serve. We strive to ensure that the spaces in which we work and community members we engage are inclusive.

**To be employed by Greylock Federal Credit Union employees must reside in one of the following states: Massachusetts, New York, Vermont, or Connecticut.**

**Review of the candidate pool for each opportunity with Greylock Federal Credit Union will begin on the fourteenth day of posting.**

**There is a $2,000 non-discretionary bonus available for full time employment. Eligibility for the bonus is $1,000 after successful completion of onboarding to be paid in the second paycheck, and $1,000 after 6 months of continued satisfactory service.**

Under the general supervision of the Processing & Systems Manager, performs a variety of processing and customer service duties to meet the highest level of quality service.

**Key Job Requirements:**

1. Performs any functions, within scope of authority and expertise, to provide the highest level of service and responsiveness to the clients, prospective clients and guests served by the Greylock Insurance Agency.

2. Supports the Agency and Credit Union focus on customer service by ensuring that all visitors and incoming calls are handled in a timely, professional and friendly manner and are directed to the appropriate person.

3. Performs cashier duties, accepting payments from customers, providing a receipt, updating Agency Management system and transmitting to the carriers within their required guidelines. Notifies Account Managers of any problems or discrepancies and directs customers for further assistance as needed.

4. Responsible for the GFCU Insurance Lead inbox, responding to inquiries, distributing the sales leads and providing a monthly report of activity to GFCU management as requested. Work with the Sales Manager to ensure staff compliance of response protocol.

5. Opens, sorts and processes all incoming mail, utilizing front end scanning whenever possible.

6. Manages daily scanning function for the entire agency, including receipt of scanning from remote locations.

7. Assists the Processing Department with any and all duties as necessary.

8. Maintains supplies for the entire Agency. Manages the front-end appearance of the agency and assists Manager in coordinating the physical needs of the Agency.

9. Prepares correspondence, memos, reports, etc. as requested.

10. Supports other areas of the Agency as needed.

**Related Responsibilities:**
11.Promotes Greylock Federal Credit Union products and services whenever appropriately possible.

12.Any and all other duties as assigned by manager/supervisor.

 **Position Requirements:**

 •High School Diploma or its equivalent
 •Two years’ experience in positive interactions with the public
 •Must demonstrate an upbeat, professional communication style and quality
 •Ability to use various types of office equipment, spread sheet applications, and proficient in Microsoft Office.
 •1-2 years’ experience with Greylock Insurance Agency and/or Credit Union a plus

**Supervisory Scope:** None