GRENVILLE
Mutual Insurance

PROPERTY & CASUALTY INSURANCE AGENT

Issue Date:	AUGUST 19, 2025
Revised Date:	
Approved by:	PAM MARSON, PRESIDENT & CEO

JOB LEVEL	LEVEL 3 or 4
TYPE	PERMANENT – FULL-TIME
REPORTS TO	BUSINESS DEVELOPMENT MANAGER

POSITION DESCRIPTION

As a Property & Casualty Insurance Agent at Grenville Mutual, you will play a pivotal role in growing our client base and delivering exceptional service. You will identify prospective policyholders, assess their insurance needs, and provide customized solutions that align with their goals and lifestyles. Your ability to build trust, maintain strong relationships, and exceed performance targets will directly contribute to our continued success and reputation for excellence.

KEY RESPONSIBILITIES:

- **Lead Generation & Pipeline Management:** Proactively identify, develop, and manage a robust pipeline of qualified leads through networking, referrals, and community engagement.
- **Relationship Management:** Cultivate long-term relationships with policyholders by delivering personalized service, timely follow-ups, and ongoing support.
- **Sales Performance:** Consistently meet or exceed individual sales targets and contribute to team objectives.
- **Product Knowledge:** Maintain a thorough understanding of Grenville Mutual's insurance products and services to effectively support existing and potential policyholders by matching products with client needs.
- **Documentation and Record Keeping:** Accurately document client interactions, policy details, and transactions in compliance with internal systems and regulatory standards.
- **Compliance:** Ensure all sales and service activities adhere to industry regulations, ethical standards, and company policies.

QUALIFICATIONS, EXPERIENCE and KEY SKILLS

- **Licensing:** Must hold an active OTL or RIBO license, or have at least 5 years of relevant sales experience with the ability to obtain a license.
- **Experience:** Minimum of 5 years in Property & Casualty insurance, preferably as an Insurance Agent or Broker
- **Driver's License:** Valid driver's license and access to a reliable vehicle.
- **Industry Knowledge:** Deep understanding of insurance business, products, services, practices and market trends.
- **Communication Skills:** Exceptional customer service, verbal, and written communication skills.
- **Sales Acumen:** Proven ability to influence, negotiate, and close sales while maintaining a client-first approach.
- **Self-Motivation:** Entrepreneurial mindset with a high degree of initiative, accountability, and goal orientation.
- **Technology Proficiency:** Comfortable using CRM systems, digital tools, and virtual communication platforms.