



**Job Description:** Front Desk/Office Coordinator  
**Reports to:** Agency Administrator  
**FLSA Status:** Non-Exempt, Full Time

### **Position Summary**

The Front Desk/Office Coordinator is the first point of contact for the agency and is responsible for ensuring the smooth operation of the office and administrative functions while providing exceptional customer service to clients, vendors, and agency staff. The Front Desk/Office Coordinator handles the flow of clients and vendors through the agency and ensures that all reception duties are completed accurately and delivered with high quality and in a timely manner. This position is an integral member of the KMi team working together to support the work of the agency. In addition to maintaining our vision by adhering to our values and guiding principles, this position must provide the highest level of service to our clients and demonstrate a client centric attitude and culture.

### **Essential Functions**

#### *Agency Support*

- Provide a broad range of clerical duties to support the agency and serve as the first point of contact for clients at the front desk
- Oversee the timely opening and closing of office
- Handle general meeting support including arranging follow up calls, maintaining office space schedules, securing food and supplies, copying, etc.
- Provide administrative and sales support to the agency staff; perform data entry, filing, and clerical duties
- Maintain and stock agency marketing and sales packets
- Process incoming and outgoing mail, shipping and receiving
- Maintain a tidy appearance in the common spaces and reception area
- Monitor the building exterior and entryway for cleanliness and safety, wash windows and sweep entryway as necessary
- Maintain and stock office equipment
- Maintain advanced technical aptitude with computers, software applications, MS Office suite and multi-line phone systems

#### *Customer Service*

- Present a professional, welcoming first contact to all clients, vendors, staff, etc. via phone, in person, and email; serve clients at the front desk by greeting, welcoming (offering a beverage), directing and announcing them appropriately; answer the phone, screen and forward incoming phone calls to specific producer as necessary
- Schedule client appointments and inform clients of all required documentation; provide courtesy reminder calls to clients about upcoming appointments

- Process outgoing insurance applications & incoming carrier renewals, ensuring completeness, within 24 hours of receiving in agency
- Monitor insurance applications daily and throughout the underwriting process to ensure a smooth application process
- Interact with insurance carriers supporting both clients and staff
- Maintain and organize client records and files in accordance with agency Knowledge Base (KB)
- Develop systems, forms and other documents as needed to increase efficiencies
- Participate in training opportunities and grow in industry knowledge in order to better support the needs of the agency

#### *Other Duties*

- Attend, participate and be present in staff meetings
- Other duties as assigned

#### **Essential Competencies**

- Knowledge of and ability to manage a multi-line phone system
- Professional appearance and friendly, approachable demeanor
- Above average communication skills both verbally and in writing
- Self-motivated, flexible, and able to function effectively in a fast-paced, data and deadline-driven environment
- Effective organizational skills in time-management and with electronic and paper records
- Ability to build a strong rapport with vendors, colleagues, and clients
- Exercise critical thinking, problem solving, sound judgment, resourcefulness, and proactivity
- Perform duties with precision and accuracy
- Always exhibit tactful and direct communication
- Work independently and as a member of the team
- Always maintain strict confidentiality, both in and out of the workplace

#### **Qualifications**

- High school diploma or equivalent required
- Bachelor's degree in a related field preferred
- Possess current life and disability license or obtain licenses within first six months of employment
- Proven ability to effectively prioritize and multi-task in a similar position required

#### **EEO Statement**

Kristin Manwaring Insurance is an equal opportunity employer without discrimination because of age, sex, color, national origin, marital status, veteran status, sexual orientation, or presence of a disability. Pursuant to the Americans with Disabilities Act, Kristin Manwaring Insurance will make reasonable accommodation of working conditions or methods in order to perform the duties of the position.

**Other Duties**

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

**Signatures**

I have read, understand and am able to perform the essential job functions with or without accommodation.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

**Front Desk / Office Coordinator**

**PHYSICAL REQUIREMENTS AND POTENTIAL HAZARDS**

The following identifies the physical demands and potential hazards typically encountered by this position. The information is necessary in part to ensure compliance with the Americans with Disabilities Act and the OSHA Blood borne Pathogens Standards. These can reasonably be anticipated in the normal and customary performance of the essential functions of your work.

**NA:** Not applicable, not required of this position.

**NE:** Requirement is present but is not essential to the position.

**O:** Occasional, up to 33 percent of the time and essential to the position. (For example, a lifeguard swims only occasionally, but it is essential that a lifeguard be able to swim.)

**F:** Frequent, 34-66 percent of the time.

**C:** Continuous, over 66 percent of the time.

	NA	NE	O	F	C
Sitting					X
Walking			X		
Standing			X		
Running		X			
Bending or twisting			X		
Squatting or kneeling			X		
Reaching above shoulder level		X			
Climbing (e.g. ladders)		X			
Driving cars, light duty trucks			X		
Driving heavy duty vehicles	X				
Repetitive motion of hands/fingers					X
Grasping with hand, gripping					X

	NA	NE	O	F	C
Lifting/carrying 10-25 pounds			X		
Lifting/carrying 26-50 pounds			X		
Lifting/carrying more than 50 pounds		X			
Pushing/Pulling		X			
Using Foot Controls		X			
Work in/exposure to inclement weather	X				
Work in/exposure to cold water	X				
Exposure to dust, chemicals or fumes	X				
Work/live in remote field sites	X				
Use of hazardous equipment (e.g. guns, chainsaws, explosives)	X				
Swimming, scuba diving	X				
Work at heights (e.g. towers, poles)	X				
Exposure to infection, germs or contagious diseases	X				
Exposure to blood, body fluid, or potentially contaminated materials	X				
Exposure to needles or sharp implements	X				
Use of hot equipment (e.g., ovens)		X			
Exposure to electrical current		X			
Seeing objects at a distance		X			
Seeing objects peripherally		X			
Seeing close work (e.g., typed print)					X
Distinguishing colors		X			
Hearing conversations or sounds					X

	NA	NE	O	F	C
Hearing via radio or telephone					X
Communicating through speech					X
Communicating by writing/reading					X
Distinguishing odors by smell	X				
Distinguishing tastes	X				
Exposure to wild/dangerous animals	X				
Exposure to insect bites or stings	X				
Work/travel in boat/small aircraft	X				
Exposure to aggressive/angry people			X		
Restraining/grappling with people	X				
Other: High volume of client contact					X
Other:					

**Items checked above must be consistent with tasks listed**

I have read and understand the physical requirements and potential hazards of this position and am able to perform the physical requirements as stated above with or without reasonable accommodation.

\_\_\_\_\_

Employee Signature

\_\_\_\_\_

Date