



College Help Job Description

Team: Instant Quote

What specific skills are you looking for?

Energy, ability to multi-task, personable and comfortable speaking on the phone, team oriented, open to coaching, good communication skills, self-directed, organized, customer service minded, detail oriented, flexible, professional, thirst for knowledge, problem solver, knowledge of Excel and Power Point

What are the essential functions of the student?

Handle incoming requests for telephone quotes, including greeting the caller, determining what the caller's needs are and transferring caller to the appropriate underwriter/team

List any additional duties that the student would be responsible for:

- Monitor Call Back folder and distribute Call Backs to appropriate underwriter. Review to make sure all Call Backs are handled
- Review and assign retail web submits to appropriate underwriter and log submits into Sharepoint. Review to make sure all submits are handled
- Assist with daily web submit and call activity reports
- Assist with the P.M. Extended Hours Schedule, including compiling, reviewing and sending the schedule each day and assigning underwriters to workstations based on availability
- Assist with the A.M. Extended Hours schedule including compiling, reviewing and sending out the schedule one day prior
- Assist with completion of the Lunch Schedule
- Special projects on an as needed basis

Additional information/notes: N/A



College Help Job Description

Team: Instant Quote Outbound Team

What specific skills are you looking for?

1. Self-motivated
2. Detail Oriented
3. Team Player
4. Desire to Learn
5. Organization
6. Time Management
7. Strong Work Ethic
8. Critical Thinking

What are the essential functions of the student?

1. Load Applicants and Quotes into our Database
2. Maintain and Update Database
3. Track Daily/Weekly/Monthly Results for the Team
4. Run and Compile Reports

List any additional duties that the student would be responsible for:

1. Working in Microsoft Office, Word, Excel Programs

Additional information/notes: N/A