

Neighborhood Insurance Agency — Santa Ana, CA

Bilingual Commercial Sales CSR (English/Spanish)

Employment Type: **Full■Time** • Work Setting: **On■Site** • Hours: Mon–Fri, 9:00 AM–5:00 PM (occasional evenings/Saturdays for community events)

About You

- Bilingual (English/Spanish) and passionate about helping others.
- Detail■oriented; comfortable on the phone and confident using a computer all day.
- Enjoy working with numbers and learning new things.
- A collaborative teammate who focuses on solutions—not problems.

About Us

We're an award■winning independent insurance agency with a heart for helping. Our business is built on relationships—within our team, with our clients and prospects, in our community, and with the companies we represent. Because we are independent, we work for our clients, not for one insurance carrier. Training is provided.

Job Responsibilities

- Build and maintain relationships with clients, prospects, and carriers via phone, email, and written communication.
- Support teammates with timely follow■up for clients and prospects.
- Research and resolve coverage questions; communicate solutions clearly.
- Respond promptly to client needs by phone and electronically.
- Maintain client files and process correspondence using both paper records and multiple software systems.
- Identify new opportunities and offer additional lines of insurance (cross■sell/upsell).
- Assist with office duties as needed.
- **This is an on■site position.**

Professional & Personal Skills

- Proficient with Microsoft Word, Excel, Outlook, and a calculator.
- Experience with **HawkSoft** (preferred, not required).

- Strong verbal and written communication skills.
- Fast and accurate typing.
- Organized, structured, punctual, and compliant with processes.
- Patient, respectful, reliable, trustworthy, friendly, and ethical.
- **P&C license preferred** (not required at hire; required to be obtained per agency timeline).

Compensation & Benefits

- **Salary:** \$40,000–\$60,000 (DOE/licensing).
- Performance bonuses.
- Healthcare (medical), paid vacation, and paid holidays.
- Ongoing training and continuing education; clear growth path within the company.

Experience & Requirements

- Minimum of **3 years** in customer service.
- Fluent in **English and Spanish**.
- Education: High school diploma required; **AA/BA preferred**.

“Every call is a chance to reassure, educate, and protect. Our clients don’t just need coverage—they need confidence.”

The Ideal A■Player Commercial Sales CSR

Core Attributes (Top 3% Agency Standards)

- **Organized** — manages renewals, pipelines, and opportunities with consistency.
- **Outgoing & Personable** — builds strong connections with clients, partners, and teammates.
- **Teacher at Heart** — explains coverages with clarity and care.
- **Bilingual (Spanish & English)** — serves a diverse community with excellence.
- **Team Player** — believes in *we win together*.

Professional Standards (Industry Benchmarks)

- **Licensed in P&C** — ready to serve and maintain compliance (or actively pursuing).

- **Coachable & Growth■Oriented** — open to feedback and continuous learning.
- **Lifelong Learner** — embraces new tools, CE courses, and industry trends.
- **Sales■Minded Service Pro** — sees cross■sell/upsell opportunities through relationships.
- **Client■Centric & Empathetic** — prioritizes service as the foundation of retention.

Performance DNA

- **Ethical & Trustworthy** — always puts the client's best interest first.
- **Detail■Oriented** — maintains accurate notes and clean documentation.
- **Tech■Savvy** — navigates AMS, CRM, and carrier/client portals with ease.
- **Persistent & Resilient** — sees tasks through; bounces back from challenges.
- **Strong Communicator** — clear, professional, and empathetic in speech and writing.
- **Time Management Master** — prioritizes effectively and meets deadlines.
- **Community■Oriented** — engages in local events and associations.
- **Goal■Oriented & Self■Motivated** — driven by mission and results every day.

How to Apply: Send your resume (and optional short cover note) to cs@niacoverage.com with subject line "Commercial Sales CSR — Santa Ana."