

CUSTOMER SERVICE REPRESENTATIVE JOB DESCRIPTION

Position Title: Customer Service Representative

Reports to: _____

A. SUMMARY

Assists in the production of new accounts and the retention of existing accounts. Provides prompt, efficient, high-quality service to designated accounts in support of Producer activities.

B. ESSENTIAL JOB FUNCTIONS

1. Responsible for gathering the information and risk management recommendations for the renewal of designated accounts sixty days prior to renewal and for delivering renewals and/or binders for designated accounts as needed, within five days of receipt.
2. Conduct periodic service calls via phone or in person for designated accounts.
3. Perform special projects at the request of designated clients after management approval. Complete binders and/or policy or endorsement requests within three days of date quoted to client.
4. Maintain timely and thorough customer and carrier interactions to minimize the potential for errors & omissions claims.
5. After reviewing updated client exposure survey information, obtain all required renewal information from the insured and complete applications for designated renewal business sixty days before renewal date. Assists Producer(s) as needed.
6. Review renewals to determine if non-standard policies can be rewritten in a standard program. Prepare rewrite applications for business through companies no longer represented at least 30 days prior to renewal. Secure and submit all required renewal underwriting information.
7. Receive phone calls and office visitors requesting quotes, changes to existing coverage and/or new policies. Complete changes/requests within 24 hours of receipt. Determine carrier placement, complete applications or endorsements, and collect premium when applicable.
8. Review existing accounts to determine if additional lines of insurance should be solicited by mail and/or phone prior to renewal.

9. Receive and review all terminations and cancellations to determine appropriate action within 72 hours of receipt.
10. Handle premium collection through form letters and request cancellation of policies when necessary.
11. Follow up on outstanding claims and provide assistance in claims resolution as necessary.
12. Solicit new business opportunities with clients for lines of coverage not currently written by the agency. Expectations are an average of one new business referral per client serviced.
13. Actively solicit increases in limits and/or coverages, rounding out accounts through new sales to clients across lines of coverage.
14. Actively seek referrals from current client base to solicit for new business prospects; follow up to generate new business using prospect database and automation system. Expectation is five referrals per week.
15. Document all material conversations with insureds and/or carriers regarding exposures and coverages.
16. Maintains working knowledge of all rating products and processes.
17. Perform other functions as assigned by management.

C. KNOWLEDGE, SKILLS AND ABILITIES

Must be an assertive self-starter with the ability to influence others. Prior successful demonstration of effective presentation skills through both verbal and written communication methods.

D. WORKING CONDITIONS/ENVIRONMENT

Fast-paced multitasking office environment. Employees are provided a dedicated workstation with basic ergonomic set up features, such as an ergonomic keyboard and mouse, dual monitors, and an adjustable chair. Workstation accommodations and adjustments are provided upon request and evaluation.

E. PHYSICAL REQUIREMENTS

Must be physically able to work a minimum of **<Enter Number of Hours>** hours per week in the office and/or field. The employee is regularly required to see, hear, and project voice well enough without amplification. There is frequent need for the employee to stand, sit, walk, use repetitive small motor activity, use hands and fingers, and reach with hands and arms. The employee is occasionally required to lift and carry

up to 30 pounds; to stoop, kneel, crouch, or crawl, and to ascend and descend stairs. This position requires a high-energy level and ability to handle stress-related situations on a daily basis. The employee may be required to drive and travel unaccompanied in diverse weather conditions.

F. OTHER REQUIREMENTS (PREREQUISITES)

Ability to use a personal computer, calculator, agency automation system, and demonstrate proficiency in various software programs, including but not limited to all Microsoft Office software suite programs.

Candidate must satisfactorily complete pre-hire employment assessments and maintain a satisfactory driving record. Candidate may be asked to submit to a drug and/or alcohol screening. A civil and criminal history background check will be performed at the company’s expense. Physical attendance is required at regular and/or mandatory company meetings. Employees are encouraged to pursue relevant professional designations; however, this is not required.

G. APPLICABLE LAWS

This employer complies with applicable federal, state, and local laws governing nondiscrimination in employment in every location in which the company has facilities. These laws include, but are not limited to:

- ADA: The employer will make reasonable accommodations in compliance with the Americans with Disability Act of 1990.
- EEO: This is an equal opportunity employer. The agency provides equal employment opportunities to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability, or genetics.
- OSHA: The employer will comply with OSHA requirements as applicable.

H. CLOSING

This job description is not intended as a contract and is subject to unilateral change and revision by management with or without notice at any time. Any written contractual agreements will supersede this job description.

I have read, understand, and agree to abide by the job description.

Signature _____ Date _____