**Title:** Customer Service Representative



**Classification:** Non-Exempt

**Status:** Full-Time

**Date:** 6/12/2024

**Reports to:** Agency Administrator

**Supervises**: None

**General Responsibilities:** Assists agents in servicing and promoting insurance products and provides quality service to agency clients.

**Essential Duties**

1. Maintain Property and Casualty insurance license in good standing.
2. Assist clients in person, via telephone, and via electronic communication with policy questions, coverage or policy changes, and issuing new policies.
3. Assist agents with change request, processing, and general policy preparation to deliver a quality experience to clients.
4. Manage customer database and create reports as needed.
5. Cross sell insurance, bank, and investment services.
6. Prospect new business regularly.
7. Review customer data and recommend marketing and communication strategies.
8. Create and maintain professional business relationships with prospects and policyholders.

**Other Duties**

1. Maintain thorough and up-to-date knowledge on all insurance products and regulations.
2. Reconcile accounts and submit deposits in the absence of the Office Manager.
3. Research unknown issues and follow up with clients in a timely and thorough manner.
4. Apply and balance conceptual and analytical thinking, break down complex problems, evaluate alternative actions, and select best course of action.
5. Work independently and take initiative to act effectively without constant direction.
6. Organize and act on several activities concurrently.
7. Perform other duties as assigned.

**Overall Accountabilities**

1. Accuracy of work.
2. Work cooperatively with co-workers.
3. Deliver positive customer service.
4. Maintain confidentiality and security of records and information.
5. Follow all policies and procedures.

**Working Relationships**

1. Works directly with Agency Administrator.
2. Works collaboratively with Office Manager and all members of the Insurance Services division.
3. Works cooperatively with all staff, community members, bank partners, and vendors.

**Desired Qualifications:**

1. High school diploma or equivalent required; bachelor’s degree preferred.
2. Insurance industry experienced preferred.
3. Property and Casualty licensed or ability to become licensed within 120 days of hire.
4. Demonstrated computer proficiency with Microsoft products required; proprietary software experience preferred.
5. Demonstrated interpersonal, written and verbal communication skills, and organizational skills required. Ability to work through situations efficiently with customer care.

**Job Specifications:**

1. Must be able to remain in a stationary position 90% of work day.
2. Must be able to occasionally move about inside the office to access file cabinets, office machinery, etc.
3. Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine, computer, and printer.
4. Frequently communicates with customers and vendors regarding details of policies and accounts. Must be able to exchange accurate information in these situations.
5. Regularly inspects documents for accuracy.