

CUSTOMER SERVICE REPRESENTATIVE JOB DESCRIPTION

Position Title: Customer Service Representative

A. SUMMARY:

The primary role of the CSR is to serve as first point-of-contact for all incoming callers. Providing excellent customer service to ensure the highest quality of service to existing and new/potential customers. Work as part of a small team of CSR's to service existing policies and promote and maintain customer retention.

This is a full-time, hourly, benefits eligible position. Benefits include medical and dental coverage, retirement option, paid time off. Once P&C License is obtained, there is ample opportunity to increase yearly salary through commission and bonuses.

Starting compensation will be based on skills, experience, and level of education.

B. Essential Job Functions

- Field all incoming phone calls and e-mails from customers seeking answers to questions regarding their policies in a pleasant and solution-oriented manner.
- Make changes and update customer accounts and policies, process policy payments, produce certificates of insurance utilizing the agency management system.
- Prepare professional written correspondence to encourage collaboration with carrier representatives.
- Solicit new business opportunities with clients for lines of coverage not currently written by Received phone calls and office visitors requesting quotes and changes to existing coverage and/or new policies. Complete changes/requests in a timely manner.
- Handle premium collection through carrier cancellation letters.
- Create accurate and detailed notes of customer interactions using the agency management system, maintain electronic customer files.
- Perform other functions as assigned by management.

C. Knowledge, Skills, and Abilities

- Experience of 1-3 years providing superior customer service in an office setting is required. Excellent Customer Service and Interpersonal Communication Skills are a must.

- Must be willing to obtain New York State Property and Casualty License within one year of hire. This training and licensure will be funded by employer.
- High School Diploma is required. Associate Degree is Preferred, but not required and additional experience will be considered in lieu of college education.
- Computer literacy is a must. MS Office experience is required. Willingness to learn electronic agency management system is also required.
- Experience in Personal and Commercial Lines of Insurance is extremely helpful, but not immediately required.
- Highly organized and able to prioritize tasks
- Detail -Oriented, maintains accurate records
- Self-Directed and takes initiative.

D. WORKING CONDITIONS AND ENVIRONMENT

Moderately paced, small business, customer-focused environment. We are a laid back, but professional office and we are seeking candidates that will easily adapt to our day-to-day operations. This office is not a corporate office environment. We work very closely with one another, and we strive to create a friendly and team-oriented atmosphere. We are also a Pet friendly office.

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. Option for hybrid employment situation is not guaranteed but may be considered after one year.

E. PHYSICAL REQUIREMENTS

Must be physically able to work a minimum of 40 hours per week in the office. There is frequent need for the employee to sit for extended periods and use repetitive small motor activity, use hands and fingers, and reach with hands and arms.

F. ADDITIONAL REQUIREMENTS

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.

G. D/E/I and E/O/O

We are committed to creating a welcoming fair and inclusive environment by offering equal opportunity to access our services. We are committed to providing accommodations and will work with you to meet your needs.