Customer Service Representative/Account Manager – Commercial Lines
Position Description

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<tr><td>Reports to</td><td>Department Head</td></tr>
<tr><td>Primary Role</td><td>Provide Service and marketing/placing expertise to assigned accounts
Support agency and assigned producers by placing and processing new business and renewals.
Retain renewals through provision of quality service.
Support sales and account growth objectives of the agency through cross selling, up selling, making inter departmental referrals and obtaining testimonials and referrals.</td></tr>
<tr><td>Performance Standards</td><td>Meet agency’s target goals for
Client service including zero backlogs in account servicing for all transaction processing
Renewal retention
Sales including new business production and referrals
Account development including cross selling and up selling
Collections
Meet agency’s productivity goals
Provide support to producers to facilitate account growth</td></tr>
<tr><td>Qualifications</td><td>Good oral and written communication skills (required)
Technical and client relations expertise (required)
Proficient in Microsoft Suite (required)
Property casualty license (required in 3 months of job acceptance)
College degree or 3 years CSR experience or 3 years P&C (required)
Property casualty commercial lines and bond product knowledge and risk management expertise (preferred)
Agency management system computer skills (preferred)</td></tr>
<tr><td>Duties</td><td>Perform all account transactions including applications, quotations, ID cards, proposals, summaries, endorsements, certificates, binders, billing, follow-up and correspondence on assigned accounts.
Maintain all client files in the agency management system with full policy detail and use the system for all transactions, notes and diaries.
Respond to client inquiries, incoming mail, company requests and producers’ needs on a timely basis.
Collect renewal data on assigned accounts, visiting clients if necessary
Review and order renewals according to agency procedures.
Survey policy coverage’s and identifies cross-selling and upgrading opportunities.
Review, analyze and submit applications to insurance companies
Follow agency’s underwriting guidelines.
Prepare quotations, coverage summaries/comparisons, proposals and recommendations needed to insure clients/prospects understanding and adequacy of coverage.
Review new business, renewals, endorsements to insure items were received as ordered.
Prepare billing following agency’s credit and collection policies.
Participate in courses for insurance/sales skills.
Maintain current knowledge of underwriting requirements of carriers.</td></tr>
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	• Keep current with industry trends by reading appropriate journals and company bulletins. • Maintain knowledge of policy provisions and any changes in these provisions. • Maintain client risk files on computer system and use computer system for all processing transactions. • Participate in any special projects at management's request.