

## **Customer Service Agent – Personal Lines**

Candidates interested in this position should be able to assist clients with personal lines coverage; work closely with companies to write and maintain business.

### **Responsibilities:**

- Assist and educate clients regarding insurance coverage and exclusions, billing, and policies available by telephone, email, or visits to the agency
- Underwrite and place new accounts; round out current client portfolio
- Quote coverage with our carriers, issue new business, make changes to policies and obtain rates for additional coverage
- Take claim reports and submit internally for processing
- Maintain computer files on clients and detail activities regarding customer contact; maintain active records on company and insured activities
- Access carrier websites for issuing policy changes and new business
- Work with producers on new accounts or changes to existing accounts; keep producers fully informed of important activities on their accounts
- Review terminations and cancellations to determine action to be taken
- Process renewals and remarkets
- Handle premium payment transactions

### **Qualifications:**

- High school diploma or equivalent; 3 years experience preferred
- Property and Casualty License, or acquire license within 60 days of hire
- Maintain knowledge of industry such as new product information, coverages, and technology to stay current and fulfill continuing education requirements
- Knowledge of insurance products and usage including rating procedures, coverages, and industry operations
- Computer skills, including word processing, spreadsheets, internet, email, and data entry skills
- Ability to work in a fast-paced environment
- Ability to problem solve
- Organizing and coordinating skills
- Excellent communication skills, both verbal and written