



Insurance Customer Service Representative 1

Job summary

The [Insurance Customer Service Representative](https://100hires.com/insurance-customer-service-representative-job-description.html) position focuses on service and sales, as we encourage Account Managers to cross-sell and upsell accounts. The ideal candidate has experience in personal insurance servicing, in both home and auto and a P&C license.

Responsibilities

- Manage an assigned book of an existing business, focusing on growth and retention
- Develop, quote, and sell Personal Insurance to new and existing clients
- Work within designated timelines to provide superior customer service to retain our clients, as well as referrals and new business opportunities
- Responsibilities for processing endorsements and creating insurance documents as needed
- Establish and maintain professional relationships with carriers and clients
- Support all initiatives as requested, guided by company values, sales culture, business needs, and scorecard

Requirements

- Insurance experience in customer service or account management for 3 years or more
- Property/Casualty License
- Relevant knowledge of insurance products, documents, and usages
- Computers skills are a must, Applied & EPIC experiences is preferred
- Ability to work well independently and on a team
- Incredible attention to detail and organizational skills
- Open to continuing education, college degree preferred
- Positive attitude, even in a fast-paced environment
- A passion to make customers and coworkers feel important and valued
- Capability to work quickly and efficiently
- Methodical, yet swift decision-making skills
- Precise verbal and written communication skills, even under time constraints

Insurance Customer Service Representative 2



Job summary

If you are a motivated and goal-oriented individual looking for a long-term career, an Insurance Company can offer a rewarding and satisfying opportunity! We are currently seeking an [Insurance Customer Service Representative](https://100hires.com/insurance-customer-service-representative-job-description.html) to join our Customer Service Team.

Responsibilities

- Researches and resolves telephonic concerns and inquiries in real time for customers and/or policyholders.
- Provides information on the claim process, policy changes, benefits, and payment modes/methods.
- Collects, documents, and enters data from and into multiple applications.
- Provides instructions and outlines the next steps for customers as it relates to claims.
- Consistently meets or exceeds expectations for departmental standards related to Quality, Service Level, Call Goal, and other KPIs.
- Understands organizational objectives, supports process improvements, and provides feedback to leadership.
- Willingness to participate in ongoing training.
- Willingness to perform other duties as assigned.
- Keep Records of customer interactions and transactions, recording details of inquiries, complaints, and comments, as well as actions taken.
- Represents the American Access Core Values: Service, Teamwork, Respect, Integrity, Vision, and Excellence.

Requirements

- Strong written and verbal communication skills.
- Ability to communicate effectively over the phone and exhibits excellent listening skills.
- Ability to resolve conflicts that may arise positively and professionally.
- Ability to provide exceptional customer service including a pleasant, professional voice on the phone with a professional attitude.
- Ability to work effectively and positively in a fast-paced environment.
- Ability to handle multiple tasks simultaneously, readily adopts new processes and initiatives, helps drive change and acceptance of the change.
- Learning orientation with the ability to learn and adapt quickly to technology, process, and procedures.
- Ability to manage competing priorities and problem-solve.
- Basic Microsoft skills with Outlook, Word, and Excel.
- Insurance experience preferred.
- Bi-lingual skills plus.



Insurance Customer Service Representative 3

Job summary

The [Insurance Customer Service Representative](https://100hires.com/insurance-customer-service-representative-job-description.html) provides service to current and prospective members for Property & Casualty insurance policies, membership, and promotion of additional products and services.

Responsibilities

30% Communication – Exhibit a high degree of professionalism at all times. Actively listen to determine customers' needs. Provide well-written and accurate communication inclusive of emails, letters, and documentation.

30% Customer Service – Understand all Insurance offerings and other Club products and services to ensure quality service delivery to members and customers. Effectively resolve member and customer concerns. Demonstrate Core Values in every interaction.

10% Sales – Educate and actively sell relevant insurance products and services during all appropriate interactions. Prospect and generate referrals. Sell and promote membership and other Club products and services. Responsible for effectively closing sales and meeting overall monthly and annual scorecard goals.

20% Technical Knowledge – Effectively utilize Insurance and Company systems, following established policies and guidelines to manage and respond to inquiries and issues. Serve as a liaison with the insurance carrier(s) to ensure timely underwriting of policies and maintain current knowledge of the insurance carriers' underwriting guidelines.

Participate in training and testing programs as required. Follow required processes and workflow on every interaction. Assist with other projects as assigned.

Requirements

High School diploma/GED required.

Personal Lines Insurance license required

Property & Casualty Insurance license preferred.

Responsible to obtain and maintain the required license or certification in an active status.

1 to 2 years of customer service experience required

Insurance customer service experience preferred

Insurance management system experience is preferred

Insurance Customer Service Representative 4



Job summary

The [Insurance Customer Service Representative](https://100hires.com/insurance-customer-service-representative-job-description.html) services the book of business that is assigned; including renewals and new business, underwriting and placing new accounts, coordinating processing and payment of claims between insured and company, collecting premiums for assigned accounts, cross-selling accounts, provide continuing service and advice to the client and producers.

Responsibilities

Respond to inquiries from Agency insured and prospects.

Assist in collections for assigned accounts by calling or writing the insureds.

Call the company to cancel for nonpayment if applicable (Agency billed accounts only).

Complete applications and rate and quote risks for new and renewal businesses.

Set up new files.

Maintain account files, checking and updating account information; purging as appropriate.

Process miscellaneous changes and endorsements and cancellations.

Prepare policies and endorsements for delivery or mailing.

Solicit coverages or expiration dates for coverages not carried by the agency.

Maintain expiration list and suspense file for assigned accounts.

Invoice accounts on all assigned accounts.

Take claim reports and forward them to the company.

Maintain claim records checking and updating information.

Maintain prospect list for new and canceled (preferred accounts) update and delete as required.

Call for expiration dates of prospects.

Before renewal, prepare key accounts for review, assemble and update entire file and account information, and prepare recommendations for upgrading coverages.

Requirements

Grade assignment based primarily upon the individual's level of experience and production capacity.

Additional consideration will be given to the size and nature of the assigned market.

High school diploma or equivalent

Two years of insurance business experience (or equivalent education and related training)

Appropriate insurance licenses

Demonstrated proficiency in basic computer applications, such as Microsoft Office software products

Ability to travel, occasionally overnight



Insurance Customer Service Representative 5

Job summary

We are looking to add a [team member](https://100hires.com/team-member-job-description.html) who shares our energy and enthusiasm for creating the best experience for our clients. We have an immediate opening for an [Insurance Customer Service Representative](https://100hires.com/insurance-customer-service-representative-job-description.html) to assist individuals and families with their insurance needs.

The ideal candidate should be a self-motivated, team-oriented professional with personal insurance experience or a strong willingness and aptitude to learn. This is a full-time position.

Responsibilities

Providing proactive and responsive service to clients

Initiating consultative sales contact with current and prospective clients

Protecting clients by recommending appropriate insurance coverages and limits

Completing all tasks and transactions promptly by agency and insurance company deadlines.

Requirements

Personal Insurance experience preferred

Property & Casualty Insurance license will be required within 6 months of employment if not already in place

Excellent verbal and written communication skills

Attention to detail

Ability to multi-task

Proficient in the use of technology, in particular, Microsoft Office and similar software

Experience with Applied Epic agency management system preferred

Insurance Customer Service Representative 6

Job summary

The [Insurance Customer Service Representative](https://100hires.com/insurance-customer-service-representative-job-description.html) provides our clients with exceptional customer service through a variety of channels to internal and external clients accurately, professionally, and courteously, while adhering to bank policies and procedures. Handles a variety of basic mortgage servicing inquiries, identifying client needs to open/refer products and services.

Responsibilities

Answer inbound client calls timely, accurately, professionally, and courteously.



Maintain required performance standards in quality, attendance, promptness, and identifying client needs.

Assist in the resolution of client needs.

Ensure the security of client information and assist with minimizing bank losses by performing client authentication on each inquiry.

Identify possible identity theft and fraud and escalate as appropriate.

Accurately identify and track the call reason for solving client needs, support ongoing teammate training, forecasting, and trending purposes.

Requirements

High school diploma or GED Strong communication (verbal and written) and interpersonal skills to fully identify client needs and resolve them with minimal client effort

Ability to work with confidential information in a professional manner

Ability to adapt to change and work in a fast-paced environment

Basic computer navigation and keyboarding skills, including the ability to multi-task and navigate between multiple systems

Prior customer service experience in a call center environment

Insurance Customer Service Representative 7

Job summary

We're searching for an [Insurance Customer Service Representative](https://100hires.com/insurance-customer-service-representative-job-description.html) to join our team.

Responsibilities

Management of an established book of business

Meet daily servicing needs of clients including quoting, completing applications, and processing endorsements

Prepare applications, proposals, binders, and Certificates of Insurance

Review policies for accuracy

Review contracts to assure clients' coverages meet requirements

Assist with department management using strong communication not only within the department but also throughout the enterprise

Utilize technology and systems to maximize workflow efficiency

Establish and maintain effective relationships with carriers and underwriters



Requirements

2 years minimum experience in business insurance servicing preferred

College degree or advanced education preferred

Proven interpersonal skills to build outstanding relationships and foster a team environment

Active Pennsylvania Property & Casualty license, or ability to obtain immediately upon hire

CISR designation preferred

Proficiency in Microsoft Office Suite; knowledge of EPIC platform is a plus

Insurance Customer Service Representative 8

Job summary

The [Insurance Customer Service Representative](https://100hires.com/insurance-customer-service-representative-job-description.html) assists the Insurance Agents and provides back-office support for the Department. This position will require providing service to existing and potential customers both over the phone and in person. The position will be responsible for maintaining department files, accepting premium payments, communicating with insurance company representatives, oversight of the agency management computer system, and reconciliation of accounts.

Responsibilities

Maintain the insurance management software program, including but not limited to data entry, preparation of reports for the agents and bank management, and reconciliation of monthly statements for the accounting department.

Be proficient in telephone communication, including assisting customers over the phone with their immediate needs or assessing those needs and being able to transfer those calls to the appropriate agency employees.

Proactively educate customers on utilizing available access channels.

Desire to study and test for Life, Health, Property, and Casualty insurance licenses while maintaining a normal workload at the office.

Participate in welcoming customers in the lobby, directing customers to the proper agency employee for assistance, and assisting customers with payment of premiums and other walk-in needs related to insurance.

Actively participate in business development through interactions with the public and establish visibility to the agency in the community.

Assist in building the customer base of the agency, and proactively contact customers to ensure customer satisfaction.

Assist licensed agents in the preparation of insurance quotes and insurance applications to be submitted to companies.

Requirements



Demonstrate a positive and helpful attitude towards customers and prospective customers.

Good interpersonal communication skills

The ability to use effective communication skills, understand procedures, and speak clearly to customers, employees, and supervisors.

Computer and data entry skills. Some accounting and reconciliation skills. Good customer service skills.

High School diploma or equivalent.

Insurance licenses not required, but willingness to seek Life & Health and Property & Casualty Insurance licenses desired.

Insurance Customer Service Representative 9

Job summary

We are looking for friendly smiling faces to join our insurance team. Apply for the [Insurance Customer Service Representative](https://100hires.com/insurance-customer-service-representative-job-description.html) position now!

Responsibilities

Assist customers with all insurance needs

Call on customers and potential customers

Educate customers and potential customers on insurance coverage

Maintain records and process claims

Supervise administrative assistants at some locations

Train new employees and provide ongoing training

Prepare budgets as needed

Promote and represent the agency and make referrals to other departments

Provide helpful and informative service and support to all customers and associates.

Troubleshoot and resolve customer and internal inquiries in a timely and accurate manner.

Requirements

High School Degree or GED

Licensed in Property and Casualty

Willingness to test for additional licenses

Strong marketing, sales, and communication skills

Ability to keep accurate records

Proficiency in spreadsheets and word processing software



Must be able to maintain a high level of confidentiality and work independently
Excellent time management, communications, interpersonal and organizational skills
Licensure in Property/Casualty and Life/Health or Crop Insurance

Insurance Customer Service Representative 10

Job summary

We are looking for an [Insurance Customer Service Representative](https://100hires.com/insurance-customer-service-representative-job-description.html) to join our team.

Responsibilities

Provide excellent customer service to clients
Maintain client data files
Communicate professionally with clients, insurance carriers and co-workers
Client accounting including invoicing and payments
Clerical support to Account Executive

Requirements

Excellent written and verbal skills
Strong math skills to accomplish basic accounting functions and rating calculations
Ability to prioritize and organize various position responsibilities
Adhere to a full-time work schedule Monday – Friday 8:30 am to 5:00 pm
High School diploma required
2 years minimum agency experience required