

Marshfield Insurance Agency Inc.

Job description: Customer Service Agent – Personal Lines

General Description: A Personal Lines Customer Service Agent is part of a team of professionals who manage, serve and advise clients regarding personal insurance offerings. CSAs assist clients by responding to their needs in a timely and efficient manner. They communicate with owners, insureds and carriers to ensure excellent customer service through proactive, frequent and courteous customer interactions, while supporting the Personal Lines team to ensure highest possible client satisfaction.

Essential qualifications:

- WI Property & Casualty insurance license required. (Can be obtained post hire.)
- Relationship driven, effective communicator with outstanding customer service oriented skills. A professional demeanor must be maintained at all times along with superior ethical standards. The ability to work well with many types of people, external and internal, with a friendly, outgoing and helpful personality.
- The ability and willingness to solve problems. Proactively initiate and follow through with multiple projects, with frequently changing priorities in a fast-paced environment.
- Results driven, self-directed, detail-oriented and adaptive with ability to efficiently produce quality work output.
- High school diploma or equivalent is required, higher education including but not limited to professional designations are encouraged. Knowledge of Microsoft Office is helpful.

Duties include:

- Interact professionally and positively with clients while acting as the first point of contact for incoming client calls/walk-ins/emails regarding billing, coverage questions, and policy changes in a timely and efficient manner. Comply with workflow guidelines.
- Assist clients and document claim reports, forward to company, and update customers on claim status in absence of claim agent.
- Accurately document ALL customer interactions and transactions, recording details of inquiries and comments as well as actions taken in the agency's management system. Electronically file and maintain organization of client documentation and communication records in the management system. Maintain account files, verifying, and updating account information.
- Prepare and process new business and renewals by gathering updated information from clients, reviewing claim activity, recommending coverages and rating policies. Work with insurance underwriters to obtain quotes, negotiate programs and rates and determine appropriate carriers for clients on renewals and new business.
- Responsible for policy administration and processing rewrites, endorsements, cancellations, and any other miscellaneous changes.
- Verify/complete internal reports as detailed in the workflow guidelines.
- Cross sale of new or additional services or products.
- Provide support to other members of team, as needed.
- Update job knowledge by participating in education opportunities.
- Perform other functions as directed by management.
- Adhere to guidelines in the employee handbook
- Maintain a clean, professional work area.

Work Status: Full time

Reporting: Personal Lines Manager

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Employee Signature	Date
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Manager Signature	Date
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