

**The Mahoney Group**  
Customer Service Representative  
Customer Service Agent (if licensed)

**Job Title:** Customer Service Representative (Agent)  
**Department:** Benefits  
**Reports To:** Office Manager  
**FLSA Status:** Non Exempt

**Summary:**

This position is responsible for working with the Producer in providing timely and professional service to clients. The CSA is expected to develop a thorough knowledge of assigned accounts and is expected to meet the Agency's defined Standard of Excellence for client service, professionalism and work attitude.

**Essential Duties and Responsibilities:**

Include some or all of the following. Since not all CSR's will have a Customer Service Support Representative, they may be required to perform some of the assistant's duties. Additional duties may be assigned.

- Review new and renewal policies for accuracy and prepare correspondence to insured and/or carrier as needed.
- Create spreadsheets PowerPoint presentations to compare plan designs for Producers to present to customers.
- Set up, design, and support "E" Services for clients.
- Respond to customer inquiries in a timely manner.
- Assist Producer in coordinating with marketing during the marketing and quotation process.
- Maintain current knowledge of insurance coverages and exposures and the insurance products and markets available to cover the exposures.
- Assist clients and policyholders in claim resolution and set appropriate activities and follow-ups.
- Performs in a manner that will prevent errors and omissions.
- Research insurance carrier web sites for plan documents and plan summaries.
- Review and adhere to processing procedures in order to:
  - Incorporate the capabilities of the system into the daily work flow
  - Streamline the workflow
- Follow agency Standard of Excellence and Best Practices procedures for processing and preparation of customer correspondence and internal correspondence as requested ensuring that activities and follow-ups are set and the client file in the agency management systems is updated and consistent with the paper file.
- Has knowledge and understanding of the HIPAA/HITECH information privacy and security laws. Follows the HIPAA privacy and security rules.

**Supervisory Responsibilities:**

This job has no supervisory responsibilities.

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**Qualifications:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Education and/or Experience:**

Industry related experience as a Benefit Lines CSR/CSA with some college preferred.

**Language Skills:**

Ability to read and interpret documents such as policy forms and procedure manuals. Ability to write routine reports and correspondence. Ability to communicate effectively with customers and/or employees of the organization.

**Mathematical Skills:**

Intermediate Skills. Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area.

**Reasoning Ability:**

High Skills. Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

**Computer Skills:**

Intermediate knowledge of Microsoft Office products such as Word, Excel, PowerPoint, and Access.

**Certificates, Licenses, Registrations:**

State specific Life and Health insurance licenses. Residential Health Underwriter, Certified Employee Benefit Consultant or other insurance professional designations preferred, but not required.

**Other Skills and Abilities:**

Experience in applied Agency Management System or other similar system for client and policy file maintenance.

**Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally required to walk. The employee must occasionally lift and/or move up to 10 pounds. Specific

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vision abilities required by this job include close vision.

**Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is occasionally exposed to moving mechanical parts. The noise level in the work environment is usually moderate. Travel is minimal with contact with customers in person, by phone, and correspondence.

**Competencies:**

Customer Service:

Anticipate, meet, and/or exceed customer needs, wants, and expectations.

Self-Management:

Demonstrate self-control and an ability to manage time and priorities.

Continuous Learning:

Take initiative in learning and implementing new concepts, technologies, and/or methods.

Written Communication:

Write clearly, succinctly and understandably.

Interpersonal Skills:

Effectively communicate, build rapport, and relate well to clients and associates.

Persuasion:

Able to convince others to change the way they think, believe, or behave.

Goal Orientation:

Energetically focus efforts on meeting goals and objectives.

We are an equal employment opportunity employer.