

Mahoney Group
Customer Service Agent – Commercial Lines

Job Title: Customer Service Agent
Department: Commercial Lines
Reports To: Office Manager
FLSA Status: Non-Exempt

Summary:

Administratively supports Producer in providing timely and professional service to clients. The CSR/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

Since not all CSR/CSA'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.

- Provide administrative support to Producer and/or Account Manager
- Respond to customer inquiries promptly and professionally. Provide assistance with coverage questions and program adjustments; solve problems regarding client account issues
- Gathers information on exposures and operations to support preparation of submission and coverage specifications as needed
- Maintain current knowledge of insurance coverages and exposures and the insurance products and markets available to cover the exposures
- Review applications and policies to identify and target new business lines for existing insured's making recommendations on account rounding as appropriate
- Review new and renewal policies, endorsements, audits, cancellations, etc. for accuracy and prepare correspondence to insured and/or carrier as needed
- Assist Producer in coordinating with marketing during the marketing and quotation process
- Assist clients/policyholders to resolve insurance claim issues in the event of a loss
- Perform in a manner that prevents errors and omissions
- Review and adhere to processing procedures in order to incorporate the capabilities of the system into the daily work flow and/or streamline the workflow
- Follow agency Standard of Excellence and Best Practices procedures for processing and preparation of customer correspondence, certificates of insurance, binders, cancellation requests, insurance I.D. cards 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).

Supervisory Responsibilities:

This position has no supervisory responsibilities.

Position Competencies:

Accountability:

Ability to accept responsibility and account for actions and work product

Accuracy:

Ability to perform work accurately and thoroughly

Customer Oriented:

Ability to take care of the customers' needs while following company procedures

Detail Oriented:

Ability to pay attention to the minute details of a project or task

Honesty / Integrity:

Ability to be truthful and be seen as credible in the workplace

Organized:

Possessing the trait of being organized or following a systematic method of performing a task

Problem Solving:

Ability to find a solution for or to deal proactively with work-related problems

Self Motivated:

Ability to be internally inspired to perform a task to the best of ones ability using his or her own drive or initiative

Time Management:

Ability to utilize the available time to organize and complete work within given deadlines

Interpersonal Skills:

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

Skills and Abilities:

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:

Substantial industry related experience as a Commercial Lines CSR/CSA with some college preferred

Certificates, Licenses, Registrations:

State-specific Property & Casualty insurance license. CISR, CIC, or other insurance professional designations preferred, but not required.

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Computer Skills:

Intermediate to Advanced knowledge of Microsoft Office products such as Outlook, Word, Excel, and PowerPoint.

Language Skills:

Ability to read and interpret documents such as policy forms, customer contracts, lease agreements, safety rules, operating and maintenance instructions, 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.

Other Skills and Abilities:

Experience in Applied Agency Management System (TAM) or other similar system for client and policy file maintenance. Experience in a paperless environment (Paperwise).

Physical Demands:

While performing the duties of this Job, the employee is regularly required to sit; use hands to finger, handle, or feel and talk or hear. The employee is frequently required to reach with hands and arms. The employee is occasionally required to stand, walk or stoop. The employee must rarely kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision.

Work Environment:

While performing the duties of this position, 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.

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