



Job Description

Title: Personal lines Customer Service Representative

Reports to: Personal Lines Manager

Description of Responsibilities:

The Customer Service Representative (CSR) provides day-to-day service to policyholders, fellow employees, and insurance carriers. The CSR is responsible for helping their team, and HMS achieve growth and retention objectives by providing timely, accurate and professional service to all customers.

Key Duties & Accountabilities:

- **Provide quality customer service**
 - A. *Process new business, renewals, and endorsements in an accurate and timely manner.*
 - Follow all HMS guidelines and procedures.
 - Review download report daily and notify Account Manager of any issues.
 - All new policies billed in the week they are received.
 - All Direct Bill renewal policies renewed and billed in the month they are effective.
 - All Agency Bill renewal offers sent to insured at least 30 days in advance of the renewal.
 - All endorsements checked for accuracy and billed in the month they are received.
 - FR-19 requests completed and mailed the day they are received.
 - B. *Provide quality claims service.*
 - Prompt response to requests for information from the customer, adjuster, or appraiser.
 - Accurate claim detail in the computer.
- **Support for PL account managers and accounting dept**
 - A. *Account Managers*
 - Accurate policy detail in computer.
 - Accurate and prompt billing.
 - Prompt response to correction request and request for information.
 - Assist with coverage and marketing letters.
 - Assist with overflow phone calls.
 - Cross-sell and up-sell when talking with clients.



- Assist with quoting when needed on policy changes, new business and remarketing.

B. Accounting Department

- Accurate and prompt billing.
 - Prompt response to correction requests and inquiries.
- **Establish and maintain good working relationships with carriers.**
- Complete and accurate submissions.
Knowledgeable of carriers' procedures.
Respond promptly to requests.
- **Maintain Tickler/Diary report**
- Follow-up on pending and open items.

Qualifications:

- High School diploma required.
- 2-3 years of personal lines insurance, customer service or relevant experience.
- Strong customer service focus.
- Solid written and verbal communication skills.
- Organizational skills to successfully handle multiple tasks.
- Attention to detail.
- Excellent listening skills.
- Demonstrated problem solving skills to resolve customer service issues.
- Good typing and data entry skills.
- Solid computer skills. The ability to navigate various systems, and use Microsoft Word and Excel.
- Must be a team player.
- Positive attitude.
- P & C license strongly preferred.