

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 exceptional customer service**
 - A. *Assist customers*
 - Answer phone calls and emails promptly and professionally.
 - Always strive to exceed the customer's expectations.
 - Continually strive to learn so you can better serve our customers.
 - B. *Process new business, renewals, and endorsements in an accurate and timely manner.*
 - Follow all HMS guidelines and procedures.
 - Manage Open Activities and keep them up to date.
 - Properly document the customer's account.
 - Review download report daily and notify Account Manager of any issues.
 - All Direct Bill renewal policies renewed 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 processed promptly, checked for accuracy and if needed, billed in the month they are received.
 - FR-19 requests completed and mailed the day they are received.
 - C. *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, Senior CSR and Accounting Department**
 - 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. Senior CSR

- Assist with overflow of work and special projects as needed.
- Assist with remarketing.

C. Accounting Department

- Accurate and prompt billing.
- Prompt response to correction requests and inquiries.

• **Establish and maintain good working relationships with carriers.**

- Complete and accurate applications and change requests.
- Knowledgeable of carriers' procedures.
- Knowledgeable of carriers' website for processing and quoting.
- Respond promptly to requests.

Qualifications:

- High School diploma required.
- 2-3 years of personal lines insurance, customer service or relevant experience.
- P & C license strongly preferred.
- Strong customer service focus.
- Strong written and verbal communication skills.
- Organizational skills to successfully handle multiple tasks.
- ATTENTION TO DETAIL.
- Excellent listening skills.
- Demonstrated problem solving and critical thinking skills to resolve customer service issues.
- Proficient with typing and data entry.
- Strong computer skills. The ability to navigate various systems, and use Microsoft Word and Excel.
- Must be a team player with a positive "can do/will do" attitude.