
VERABANK – CFG INSURANCE

Job Description

JOB TITLE: Personal Lines CSR

DEPARTMENT: Insurance

SUPERVISOR (TITLE): Agency Manager

PRIMARY FUNCTIONS:

Ensures profitable growth and account retention, long-term company and client relationships, and effective utilization of corporate resources. Provide in-house courteous, efficient, and beneficial customer service and sales to clients to promote a positive lasting relationship and encourage the client to refer others to the agency.

SCOPE OF RESPONSIBILITIES:

1. Implement agency policy as established.
2. Market renewal business, determine premiums, prepare and present proposals to clients.
3. Market, determine premiums, prepare and present proposals for cross-sale business.
4. Maintain underwriting and marketing information by carrier.
5. Maintain expiration control log.
6. Process renewal policies for accuracy in rating, typing, coverages, signatures, and input these transactions to generate billing invoices. Ensure that these items are delivered and/or mailed to client.
7. Receive phone calls from clients and companies regarding insurance, claims, or administrative problems, and comply with the request and/or refer to the producer or agency manager only when necessary.
8. Maintain a suspense system in the Agency System to follow up on outstanding orders, correspondence, reports, and follow up on overdue and suspense items.
9. Be familiar with and follow agency E&O guidelines.
10. Maintain electronic and/or paper files in an orderly, up-to-date manner.
11. Ensure high levels of customer satisfaction and customer service by improving ongoing service delivery methods.
12. Perform special projects at management's request.
13. Sales of personal lines.

SPECIFIC REQUIREMENTS

1. High school diploma or equivalent experience.
2. P & C insurance license.
3. Experience in Personal Lines P & C.
4. Excellent oral and written communication skills.
5. Excellent customer service skills.

PREFERRED REQUIREMENTS

1. Ability to work independently and as part of a team with excellent time management skills.
2. Ability to multi-task.
3. Knowledge of personal computer and related word processing and spreadsheet software.

- 4. Detail oriented.

PHYSICAL REQUIREMENTS

Office setting with moderately varied desk-oriented activity, with fatigue being relieved by opportunities to stand and move around in a comfortable environment.

NOTICE

- 1. This job description in no way states or implies that these are the only tasks to be performed by the incumbent occupying this position. The incumbent will be required to follow any other instructions and to perform any other job-related duties.
- 2. Requirements are representative of minimum levels of knowledge, skills, and/or abilities. To perform in this position successfully, the incumbent will possess the abilities and aptitudes to perform each task proficiently.
- 3. Ability means to possess and apply both knowledge and skill.
- 4. This position description has excluded the marginal or peripheral functions that are incidental to the performance of primary functions. All requirements are essential to the function of the position.
- 5. This job description describes the minimum selection requirements to qualify for the position. However, promotion and other employment decisions are also based on Agency needs, being in good standing, fully competent performance, and other non-discriminatory issues.
- 6. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.
- 7. Some requirements may exclude individuals who pose a direct threat or significant risk to the health and safety of themselves or other employees.
- 8. This position description does not create an employment contract, implied or otherwise, other than an "at will" employment relationship.

Employee

Department/Division Manager

Date

Date