

## Commercial Lines -Customer Service Representative

**Department:** Producer Unit  
**Reports to:** Producer  
**Revision Date:** 12/05

**FLSA:** Exempt  
**Grade:**

### **POSITION SUMMARY**

Support assigned Producer(s), Account Executive(s), and/or Account Manager(s) by working to process new business and retain renewals. Service assigned accounts as directed by the Producer(s), Account Executive(s), and/or Account Manager(s).

### **JOB DUTIES/ESSENTIAL FUNCTIONS**

1. Perform all account transactions including applications, quotations, ID cards, proposals, summaries, endorsements, certificates, binders, cancellations, follow-up, and correspondence on assigned accounts using the Agency's Management System (Applied).
2. Respond to client inquiries, incoming mail, and company requests on a timely basis.
3. Collect renewal data on assigned accounts.
4. Review and order renewals according to Agency procedures. Check applications and policies for accuracy. Investigate non-renewals and assist in remarketing accounts.
5. Work with the Producer(s) and Marketing Department to review, analyze, and submit applications to the insurance companies.
6. Prepare quotations (coverage summaries/comparisons, proposals, and recommendations) as needed to facilitate clients/prospects understanding of coverages.
7. Utilize Agency Management System (Applied) to maintain files and process transactions on all accounts.
8. Expand knowledge of the insurance business by engaging in self-development activity and relevant insurance course work (CISR, ACSR, etc.).
9. Perform other duties as assigned.
10. Prompt and reliable attendance required.

### **NONESSENTIAL FUNCTIONS**

1. General filing which may require some lifting and reaching.
2. Process expired files and prepare files for storage which may require some lifting and reaching.

### **POSITION REQUIREMENTS**

**Education/Experience:** High School diploma or equivalent, 2 to 3 years of insurance agency experience working with commercial lines products; knowledge of Microsoft Word and Excel helpful; Applied knowledge a plus.

**Licensure/Certification:** Current Missouri Producer's license required.

**Personal Characteristics:** Friendly, positive attitude; willingness to help others; good organizational skills; customer focused; excellent written and oral communication skills; effective problem solving techniques, and the ability to adapt to changing situations.

I have read and understand the Commercial Lines Customer Service Representative job description and can perform the essential functions with or without reasonable accommodation. Nothing in this job description restricts management's right to assign or reassign duties and responsibilities at any time. This job description reflects management's assignment of essential functions but does not prescribe or restrict the tasks that may be assigned.

Further, I understand that this job description in no way constitutes a contract of employment or restricts the rights of the Chas. L. Crane Agency Company as an "at-will" employer under Missouri law.

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Signature of Employee

\_\_\_\_\_  
Signature of Supervisor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date