

## **Cresco Insurance Agency, Inc.**

### **Customer Service Representative**

#### **Position Summary**

Services agency customers and prospects; process insurance documents and lend support to the Agency Producers to increase agency retention and revenue.

#### **Responsibilities**

Works with customers and/or producers to ensure adequate coverage, answer policy questions, resolve problems, accept policy changes, etc.

Prepare and review various documents such as renewals, claims, new applications, change requests, underwriting requests, etc.

Assist Producers in marketing current and prospective customers.

Process and submit policy changes with insurance carriers.

Reconcile Life & Health carrier commission statements.

Assist Life & Health Department with Medicare Part D and Health Care enrollment functions.

Assist Life & Health Department in submitting customer policy changes.

Service, quote, issue and process claims for AFLAC customers.

Maintains working knowledge of carrier interface systems and rate manuals.

Maintains relationship with company underwriters.

Follow agency policies and procedures regarding document workflow.

Works in a manner to prevent errors and omissions.

Attends carrier provided product seminars, maintains insurance license(s) with continuing education, and keeps current with changes in the insurance industry.

Act as back-up for daily Download in TAM.

Act as back-up for processing customer claims.

Perform all other duties as assigned.

## **Requirements**

1. High school diploma or general education degree (GED); or one to two years related experience and/or training; or equivalent combination of education and experience.
2. Ability to read and comprehend simple instructions, short correspondence and memos.
3. Ability to effectively present information in one-on-one and small group situations to customers, clients and other employees of the organization.
4. Must be able to operate a multi-line telephone, copy and fax machine.
5. Experience with Outlook, Excel, WORD and MS Office software programs.
6. Must be able to use the agency management software, TAM, in order to satisfy the positions job requirements.
7. Insurance licenses will be required and be maintained after employment.
8. Position requires the ability to work before or after normal business hours to attend various employee meetings and training sessions.