

Name: \_\_\_\_\_

Date: \_\_\_\_\_



**JOB TITLE:** Customer Service Representative – Commercial Lines

**REPORTS TO:** VP, Commercial Lines

**FLSA:** Exempt

**JOB SUMMARY:**

Under the direction of the VP of Commercial Lines, this position will provide support to clients and Account Executives in obtaining, maintaining, and servicing commercial lines accounts.

**RESPONSIBILITIES:**

- Generates evidence of insurance for insureds, mortgages, and lessors.
- Processes endorsements across several different lines of insurance by adding/deleting vehicles and drivers, mailing addresses, contact information, premise addresses, etc.
- Retrieves policy documentation from various insurance portals for Account Executive review.
- Responsible for taking payments, handling cancellations, and updating clients.
- Creates and maintains summaries of insurance.
- Sends policies to insured.
- Answers insurer's inquiries about their insurance.
- Conducts audits.
- Reviews and processes loss run requests.
- Drafts and sends close out letters.
- Other duties as assigned.

**JOB REQUIREMENTS:**

- Education: High School diploma or equivalent.
- Valid Florida state 4-40 Insurance License.
  - Must obtain license within 6 months of employment.
- Experience: Customer service experience in insurance, desirable.

**KNOWLEDGE, SKILLS AND ABILITIES:**

- Strong technical insurance knowledge and background. Strong customer service focus, energetic, action oriented and ready to seize any opportunity.
- Responds with a sense of urgency as required.
- Strong communication and negotiation skills under stressful situations.
- Ability to work independently but also assists members of the team.
- Ability to always maintain professional manner.
- High Degree of self-motivation, discipline, and discretion.
- Advanced time management and organization skills.
- Strong Microsoft Word, Outlook, and Excel knowledge.

Name: \_\_\_\_\_

Date: \_\_\_\_\_



**WORKING CONDITIONS:**

- Physical Effort: normal level of mental/visual effort associated with on-going use of PC and normal levels of physical effort.
- Work environment: normal office environment with minimal exposure to health or safety hazards.
- Equipment Used: PC and printer, telephone, copy machine, fax machine.

**WORKING RELATIONSHIPS:**

- Reports to the VP of Commercial Lines.
- Constant interaction with clients and Account Executives.

*The above primary job duties and responsibilities describe the level and nature of work performed by the employees assigned to this job. The description should not be construed as an exhaustive listing of all job duties and responsibilities performed by this job.*

\_\_\_\_\_  
Employee Name (Please Print)

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date