

JOB DESCRIPTION

Customer Service Representative (CSR)

Job Responsibilities:

Serves customers by providing product and service information; resolving product and service problems.

Customer Service Representative Job Duties: (included but not limited to the following)

- Attracts potential customers by answering product and service questions; suggesting information about other products and services.
- Manage and maintain customer records by updating account information in agency management system.
- Resolves product or service problems by clarifying the customer's complaint; determining the cause of the problem; selecting and explaining the best solution to solve the problem; expediting correction or adjustment; following up to ensure resolution.
- Processes new policy applications.
- Processes customer policy changes.
- Recommends potential products or services by collecting customer information and analyzing customer needs.
- Prepares product or service reports by collecting and analyzing customer information.
- Contributes to team effort by accomplishing related results as needed.
- **Assist receptionist and/or office with answering phones with a courteous and friendly attitude.**
- Assist in completion of projects as assigned.

Customer Service Representative Skills and Qualifications:

Customer Service, Product Knowledge, Quality Focus, Problem Solving, Market Knowledge, Documentation Skills, Listening, Phone Skills, Resolving Conflict, Analyzing Information, Multi-tasking

CSR Skills and Qualifications:

Bachelor's degree or equivalent job experience. Requires a general agent's license.

Prospecting Skills, Meeting Sales Goals, Motivation for Sales, Selling to Customer Needs, Client Relationships, People Skills, Product Knowledge, General Math Skills, Organization, Dependability, Statistical Analysis.

Employee Signature

Date