



Personal Client Service Representative

Reports to: Joe Biernacki
Status: Full-time, non-exempt
Office: Valparaiso

About General Insurance Services

General Insurance Services is a full service independent insurance agency with over 80 years of experience serving Northwest Indiana, Southwest Michigan, and many accounts in the greater Chicago market. Our mission is to “secure the future of the communities we serve” through not only our work, but our community outreach as well. We invest in our team members through training and development to help them reach their career goals and personal aspirations.

At General Insurance Services:

- We offer a competitive salary and benefits package.
- We provide ongoing training to help you learn your job.
- We deliver constant coaching and feedback to help you develop your skill.
- We encourage professional development.
- We support individual volunteer efforts within the community

General Insurance Services was recently named one of the “Best Places to Work in Indiana.” Our office is growing, and we are looking to train the right individual to fit right into our company. If you are motivated to succeed and would like to join our team, please complete our application. We will follow up with you on the next steps in the interview process.

Benefits

Benefits include Medical, Dental, Vision, 401k, Paid Time Off and Life Insurance.

Purpose

The Personal Client Service Representative responds to incoming telephone calls, emails, and postal mail to provide timely and accurate guidance and service to customers of Personal Line products.

Responsibilities:

1. Ensure customer satisfaction, growth, and retention of business by providing top quality service and problem solving.
 - a. Provide customers accurate options when policy changes are requested. Guide the customer throughout the process of all potential changes.
 - b. Listen to and respond to all inquiries related to documents customers receive from insurance carriers, lenders, or other sources.
 - c. Assist the customer with all billing questions.
2. Resolve customer inquiries and problems.
 - a. Identify customer needs.

- b. Interpret and explain company's policies to customers.
 - c. Use a variety of resources to make recommendations and resolve policy inquires or problems.
 - d. Respond to all incoming calls, voicemails, and emails from clients, ideally within the same day.
 - e. Communicate directly with agent, as needed.
3. Processes and documents a large quantity of customer requests.
 - a. Manage suspenses in a timely manner, within 48 hours.
 - b. Documents activities in a way that anyone can understand what the customer's immediate need is and what has already been accomplished.
 - c. Documentation clearly reflects follow through and closure.
 4. Handles billings of customers.
 - a. Communicate effectively with insuring companies regarding billing situations, modes of payment and reinstatement of policies.
 - b. Processes bills internally to assure agent's commission is accurate and timely.
 5. Processes all customers' transactions.
 - a. Utilizes company websites for information, changes, and billings.
 - b. Utilize a variety of software systems to stay apprised of all changes and inquires.
 - c. Follows through on all customers' transactions.
 - d. Processes rescoves, deductible quotes, process and bill new business and rewritten policies.
 - e. Other duties may be assigned as need arises or as required to support the agency's essential functions.
 6. Provide regular front desk coverage relief.
 - a. Clerical support may include acting as receptionist, accepting customer payments, recording/uploading payment, making the bank deposits for the office and picking up/dropping off mail at the post office or another office as needed.
 7. Provide Personal Lines Producers timely and accurate quotes for the producers to remarket accounts in an efficient manner.
 8. Renewal Reviews; Communicate via phone or email with customers on their monthly expiration lists.

Knowledge, Skills, and Abilities:

1. Indiana Property and Casualty agent's license is required.
2. This fast-paced position requires an Associate or Bachelor's degree or equivalent business experience; the ability to read quickly with good comprehension; the ability to write using good grammar and punctuation and precise mathematical skills.
3. The ability to deftly access all company websites for billing information and uploading endorsements.
4. Empathic listening skills and careful speaking skills.
5. A thorough knowledge of the phone system, including the ability to transfer calls and conference call.
6. The ability to use Outlook to send and receive emails including attachments.
7. The ability to utilize the in-house software systems within 60 days of employment. These skills include using the Genifax, scanning and attaching appropriate items in AMS,

PL Rater, a working knowledge of carrier websites and TransactNow to answer customer questions and service their needs.

Physical Demands and Working Conditions:

- Viewing computer terminal, perceiving, and transcribing data with accuracy and keyboarding fill much of the day in an office environment.
- Communication with telephone callers and associates requires an ability to express oneself as well as perceive and exchange ideas.
- The employee is not exposed to adverse environmental conditions, working primarily in an office environment.
- Sedentary work. Exerting up to 10 pounds of force occasionally and/or negligible amount of force. Work can require stooping, kneeling, crouching, as well as grasping objects, and reaching with hands and arms.
- The employee is occasionally required to stand and walk.
- Reliable physical attendance is required.