

## Customer Service Representative

We're looking for a motivated, outgoing individual to join us in this excellent opportunity. Working in a supportive team environment, you would have the opportunity to directly help individuals with healthcare needs as you offer them support and service with their health programs. Enjoy growth potential, performance incentives and a true work/life balance when you apply your talents with us!

### Responsibilities:

- Receives documents and processes all clients' requests for service.
- Where appropriate, communicates client service issues to Agency Sales Executives and or insurance producers.
- Checks accuracy and completeness of all agency and direct bill transactions (policies; endorsements; audits, etc.).
- Updates data and documents activity in agency operating (AOS) and management (AMS) systems.
- Communicates directly with insurance company in the event that policy changes become necessary.
- Updates and maintains Agency client inventory on an as needed basis.
- Reviews renewals that will be marketed according to current management policy.
- Monitors expiration list in accordance with agency procedures. Submits information to insurance companies in accordance with each company's specifications.
- Works to ensure agency maintains renewal retention goals and objectives.
- Issues certificates of insurance as needed.
- Ensures Agency is in compliance with regulatory and contractual obligations. Follows all Agency rules and procedures.
- Obtains and maintains active Group I Health and Life Insurance License. CSR's that possess such license must attend continuing education classes and seminars to keep license in active status.
- Communicates directly with insurance company partners to address issues surrounding policy cancellation, reinstatement and non-renewal.
- Acts on behalf of client in resolving client problems with the insurance carrier.
- Where possible, assists employers and employees who have sustained a claim or billing issue.
- Works with insurance carriers to ensure that any claim data the agency receives is forwarded to the insurance carrier's claims department.
- Maintains relationships with clients and anticipates future needs, and calls established clients to renew and upgrade accounts.
- Performs special requests and projects at management's request.  
Able to answer basic customer questions based on data provided by various operating systems within the agency as well as client files.
- Must be able to evaluate situations that require elevation to a senior team member and/or team manager.  
Accountable for providing timely, accurate information to insurance clients and insurance carrier partners.
- Must have strong working knowledge of all agency procedures and systems.
- Responsible for overall client satisfaction.  
Internal contacts: Producers, implementation specialists, other CSR's.
- External contacts: Insurance clients, insurance carrier partners, outside insurance producers.

### Qualifications:

- Proven ability to provide quality customer service.
- Experience in health & life, HR or benefits administration is a plus.
- Have strong interpersonal skills and a pleasant telephone manner.
- Must be detail oriented.
- Strong computer skills including proficiency with Windows.
- Excellent verbal and written communication skills

Education and Experience:

- High School Diploma and Bachelor's or other 4-year degree preferred
- Minimum of 3 years tele-prospecting experience, preferably with high technology markets
- Skilled in open-ended questioning
- Comfortable gaining the confidence of business owners and executives
- Superior time management and organizational skills
- Ability to handle multiple projects
- Proven interpersonal verbal communications and writing skills required
- Demonstrated ability to operate and utilize marketing computer systems as well as general business software including MS Word, Excel, and Outlook email