

The Service Agency

Your Insurance Connection

369 West Main Street, Ellsworth, WI 54011

POSITION

Customer Service Representative (Property & Casualty Insurance for Commercial Accounts)

JOB DESCRIPTION

The Service Agency, an insurance company located in downtown Ellsworth, Wisconsin, is growing and we are looking to add a full-time Customer Service Representative to help our busy independent agency with insurance sales support and a high level of service with our commercial lines' accounts. You will have extensive contact with clients and prospective clients, so we need someone who can bring positive energy and a smile to work every day.

This is not a routine customer service position, but a career opportunity. We're seeking someone who wants to help coordinate activities to assist in securing new business while nurturing valuable relationships with existing clients as their go-to insurance consultant.

You'll often be the first point of contact for our business clients when they need service on their policy or need help navigating through their coverage.

We need someone who understands how important teamwork is in supporting agency growth and can help us network our agency within various marketing platforms, plus assist agency management to communicate to our clients how to improve management of their risks.

If you're detail oriented, able to juggle multiple tasks simultaneously, can manage projects with ease, and thrive in a family-centered team environment with a strong personality, you might be perfect for the job. Especially if you want to make a difference for not just months but years at the Service Agency.

GENERAL REQUIREMENTS

- High degree of professionalism;

- Basic bookkeeping skills recommended as position will entail billing, management of client's payroll for premium reviews and assigned book work from agency principal;
- Customer service experience;
- Strong people skills;
- Resourceful;
- Self-motivated;
- Quick learner;
- Thrives in fast-paced environment;
- Detail oriented;
- Able to multi-task without impacting work quality;
- Outstanding written and verbal communication skills;
- Ability to work on a deadline;
- Excellent follow through;
- Keen organizational skills;
- Proficient in Microsoft Office Suite; and
- A positive, friendly, respectful attitude is a must.

JOB RESPONSIBILITIES

- Maintain and build customer relationships;
- Service assigned book of business;
- Customize insurance plans suitable for our clients;
- Focus on assisting team with increasing/retaining business for agency;
- Process new and renewal applications;
- Work with our carriers to support market penetration of niche markets;
- Handle policy changes, issues and review client's renewals, offering recommendations to clients based on needs and exposures;
- Work with underwriting to quote, underwrite and process applications;
- Work with agency management system to maintain detailed records, communications and processing of claims, applications, audits, binders, endorsements or other insurance information; and
- Manage incoming payments, issue agency billing notices, work with our billing system to manage client and associate invoices; prepare accounting reports.

EDUCATION & CERTIFICATIONS

- Three (3) years of relevant experience required;

- Two-year associate degree in business, communications or marketing recommended; and
- Knowledge of insurance industry a plus; property and casualty insurance license recommended but not required.

SALARY & BENEFITS

- \$38,000 - \$43,000
- Performance bonus plan
- Major holidays and 10 days PTO annually
- Life & disability benefits
- Simple Retirement Plan with company match