

*k.p.d insurance, Inc.*  
*Job Description*

**Job Title:** Customer Service Representative (CSR)  
**Department:** Workers' Compensation  
**Reports To:** Director of Workers' Compensation  
**FLSA Status:** Non-Exempt  
**Date:** May 2014

***JOB SUMMARY***

Provide accurate technical assistance, prompt and courteous service to customers, Account Managers, Sales Executives and company personnel. Grow and develop talents and insurance knowledge to highest level possible. Provide a high level of support in obtaining, maintaining, expanding and servicing Workers' Compensation accounts.

***ESSENTIAL DUTIES AND RESPONSIBILITIES***

The following functions are to be performed in accordance with the agency policies and procedures and with the highest degree of ethical standards and confidentiality.

- Provide quality, professional service to customers.
- At Account Manager's direction, initiate pre-renewal process:
  1. Request payrolls & renewal certificate data from client.
  2. Update apps and client screens once payrolls arrive.
  3. Request or pull losses.
  4. Update premium/loss summary if needed.
  5. Produce SBAP form for pre-renewal meetings with producers.
- Assist Account Manager(s) with wrap up process for renewals as needed.
- Provide accurate information to underwriters and respond to customer requests.
- Issuance of on demand Workers' Compensation certificates for assigned Producers.
- Provide backup for issuing Workers' Compensation certificates.
- Request and process endorsements and make changes to agency management system.
- Assist with development of customer and insurance company presentations.
- Ability to perform all tasks assigned to the CSR in the day-to-day servicing and maintenance of producer's book of business in a timely, accurate and professional manner.
- Service Workers' Compensation accounts in a manner to eliminate gaps in coverage, thus reducing our E&O exposures.

- Keep informed on current insurance markets, market trends and industry changes. Participate in seminars and classes for skill and knowledge development.
- Provide large account detail work including retro plan reviews, as assigned.
- Provide primary backup to assigned Account Managers.
- As needed, perform technical duties such as processing policies and endorsements, cancel and reinstatement notices.
- Back up Receptionist – 28 phone lines
- Perform special projects at Director's request.
- Other duties may be assigned.

### **QUALIFICATIONS:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required.

#### EDUCATION and/or EXPERIENCE:

High School diploma or equivalent is required. A minimum of three to five years related industry experience and/or training desired.

- Knowledge of Workers' Compensation insurance.
  - Ability to read, analyze, and interpret industry policies and contract documents.
  - Ability to respond to common inquiries or complaints from customers or carriers.
  - Ability to write and prepare proposals for presentation and review.
  - Ability to write professional letters to insureds and carriers.
  - Ability to effectively present information to insureds and carriers.
  - Ability to apply basic mathematical concepts such as percentages, adding, subtracting, multiplying and division.
  - Ability to apply mathematical operations to required tasks.
  - Ability to define problems, collect data, establish facts, and draw valid conclusions.
- Proficient in Word & Excel.
- Professional telephone skills and etiquette.
- Ability to accurately type/data input at a minimum of 40 WPM.
- Strong written and verbal communication skills.
- Self-motivated and ability to work independently with limited supervision, or within a group or team.
- Ability to organize and prioritize work.
- Positive attitude towards peers, carriers and clients.

CERTIFICATES, LICENSES, REGISTRATIONS: Maintain a current Oregon General Lines License. (Can be obtained after hire)

## PHYSICAL DEMANDS

While performing the duties of this job, the employee is regularly required to talk or hear. The employee regularly is required to sit and use hands to finger, handle, or feel objects, tools, or controls. The employee is frequently required to stand, walk, and reach with hands and arms and/or carry, move or transport items from one area to another. Specific vision abilities required by this job include close vision and the ability to adjust focus.

## WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.

- Work is performed indoors in in a fast-paced team office environment.

***DISCLAIMER:** This job description indicates the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties,*

