

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

**Job Title:** P & C Customer Service Representative (CSR)  
**Department:** Property & Casualty  
**Reports To:** Director, Property & Casualty Operations  
**FLSA Status:** Non-Exempt  
**Date:** April 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 commercial 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.
- Process endorsements
- Order Change Requests
- Issue Certificates of Insurance
- Check new and renewal policies for accuracy, based on proposals, applications and expiring policies.
- Monitor expiration list for customer accounts and initiate renewal process; assist Account Manager(s) with renewal setups.
- Order Motor Vehicle Records
- Limited marketing of new and renewal business and develop market strategy as required; account placement from start to finish with direct supervision.
- Attend Marketing meetings, as directed, and incorporate adopted marketing procedures in workflow.
- Provide accurate information to underwriters and respond to customer requests.
- Develop, coordinate and pull together customer and insurance company presentations.
- Ability to perform all tasks assigned to the Customer Service Representative in the day-to-day servicing and maintenance of Sales Executive(s) book of business in a timely, accurate and professional manner.
- Service commercial lines accounts in a manner to eliminate gaps in coverage, thus reducing our E&O exposures.
- Maintain electronic and/or paper files in an orderly, up-to-date manner.

- Keep informed on current insurance markets, market trends and industry changes. Participate in seminars and classes for skill and knowledge development.
- Word Processing – Excel & Word
- Back up Receptionist – 28 phone lines
- Perform special projects at Director's request.
- Other duties may be assigned.

### ***SKILLS AND ABILITIES***

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. Required a minimum of 1 year industry related experience. Prefer a minimum of two years of related industry experience and/or training.
- ◆ LANGUAGE SKILLS: Thorough knowledge of all lines of insurance in area of specialty. 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.
- ◆ MATHEMATICAL SKILLS: Ability to apply basic mathematical concepts such as percentages, adding, subtracting, multiplying and division. Ability to apply mathematical operations to required tasks.
- ◆ REASONING ABILITY: Ability to define problems, collect data, establish facts, and draw valid conclusions.
- ◆ CERTIFICATES, LICENSES, REGISTRATIONS: Maintain a current Oregon General Lines License. (Can be obtained after hire.)
- ◆ OTHER SKILLS and ABILITIES:
  - Knowledge of Property & Casualty Insurance
  - Knowledge of Carriers and industry standard forms.
  - Professional telephone skills and etiquette.
  - Familiarity and ability to operate PC in Windows Environment.
  - Proficient in Word & Excel.
  - Ability to accurately type/data input at a minimum of 55 WPM.
  - Familiarity with general office procedures.
  - Strong written and verbal communication skills.
  - Familiarity in the use and ability to operate general office equipment.
  - 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.

#### ESSENTIAL PHYSICAL FUNCTIONS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

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.

Office: Duties are performed in a fast-paced team 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, responsibilities, and qualifications required of employees assigned to this job.*