



Adventist Risk Management Job Description

Job Title: Customer Service Representative

Department: Client Care

Category: Non-exempt

Pay Grade: 500

Supervisor: Manager, Client Services

POSITION SUMMARY

Assist assigned Account Executive(s) in serving clients, including gathering and maintaining policy renewal data, preparation of schedules of insurance, processing certificates of coverage, and performing general administrative duties.

ESSENTIAL JOB DUTIES

- Providing excellent customer service to our clients on the phone, through email and in person.
- Issuing complete and sometimes complicated certificates accurately and timely per the needs of the insured.
- Working with Account Executives, Underwriters, Producers and other team members to ensure the client's requests are taken care of quickly and correctly.
- Maintain well-organized files/records for the Account Executive team, to include distribution of in-coming mail and messages, managing and tracking projects and time sensitive company processes under the direction of the department manager.
- Assist the Account Executives as they complete applications and bind policies by keeping up to date records such as property values and auto schedules.
- Assist in checking policies and applications for accuracy and requesting corrections when needed.
- Policy changes through endorsements.
- Assist in the development and implementation of the annual client service plan with the Account Executive.
- Responsible for following-up on all client service issues received with the appropriate ARM team member.
- Prepare and maintain schedules of insurance.
- Assist the Account Executive local church billing which also includes: sending invoices and statements, bill collections, and handling questions as they arise from the local field.
- Perform other duties as assigned.

EDUCATION AND EXPERIENCE

High School Diploma or equivalent required. Bachelor's degree in business related field preferred. A minimum of two years of successful general office experience is required. Associate in Insurance certificate and/or general insurance experience is preferred. Successful completion of Property & Casualty license within two years is required.

KNOWLEDGE AND ABILITIES

- Preferred knowledge of denominational organizational structure and general insurance principles.
- Proficiency in using Microsoft Office.
- Highly organized/Self-motivated.
- Must be able to work efficiently and accurately with little supervision.
- Must be able to work in a team environment.
- Possess good telephone skills.
- Able to work in a deadline-oriented environment.

If you are interested in this position please contact ARM Human Resources at 301-453-6983 or email: rfiddis@adventistrisk.org by July 25, 2019.