



Customer Service Representative

Job description

Growing Independent Insurance Agency in Severna Park seeks a FT experienced, Personal Lines CSR to manage a portion of the agency's personal lines book. Candidate should possess a positive attitude and be willing to provide a high level of support in obtaining, maintaining, and servicing personal accounts.

Candidates must possess the following:

- Valid Maryland property and casualty license in good standing.
- Minimum of a High School Diploma or equivalent, preferred Associates or Bachelor's Degree
- Comprehensive knowledge of personal insurance and products
- Excellent oral and written communication
- Excellent organizational skills and the ability to prioritize and multi-task in a fast-paced environment
- Minimum of 2 years' experience in a customer service position.
- Experience with MS Word, MS Outlook and MS Excel is required.
- Strengths in cross-selling and account rounding
- Energetic & Positive attitude, looking to "WOW" customers

Major Responsibilities

Service Personal Lines accounts as assigned and aid in collections. Collect premiums per established agency procedures. Initiate, screen and prepare endorsement requests for Personal Lines clients. Prepare and process cancellations when required. Prepare and process all requests for certificates of insurance as required within 24 hours of request. Review all applications, policies, endorsements for accuracy. Setup and prepare new account files per agency procedures. Prepare account summaries as required. Prepare ID cards, evidence of property, certificates, binders, and/or obtain underwriter approval on manuscript endorsements. Maintain suspense items in a timely manner. Prepare expired policies for filing in cancelled/expired files. Keep current on rates, forms and coverage changes through circulars, bulletins, trade publications, seminars and schools offered. Participate in seminars and classes for skill and knowledge development. Maintain all client activity in the agency automation system. Service personal lines accounts in a manner to eliminate gaps in coverage, thus reducing our E&O exposures. Prioritize work load and/or request for assistance as required. Manage expirations and remarket as necessary. Assist other agency departments in securing and/or providing information necessary to issue appropriate policies in their department for which we have a mutual client. Meet with clients to discuss and handle their insurance needs. Assist prospects/insureds until an Account Executive is available. Assist Claims Department in providing coverage information. Assist other departments and Account Executives in cross selling and account rounding. Immediately report all malfunctions of system software to manager. Assume other job responsibilities as assigned by dept manager

Moran Insurance provides a competitive salary along with excellent benefits package: Health, Dental, Short term and Long term disability, Life Insurance, 401K, College Savings plan, AFLAC, 15 days PTO, quarterly retention bonus, Agency pays for CE and Insurance designation course work. All licensed CSRs are paid 1st yr commissions on business they bring to the agency.

Desired Skills and Experience

***** Candidates with the following will be given special consideration: Experience with Applied management system; Knowledge of EZ Lynx comparative rater, Professional designation, a valid MD Property & Casualty license*****

If you are interested in applying for this job, please send your resume to Marc Dorman

mdorman@moraninsurance.com