

Job Title: Client Service Specialist
Reports To: VP of Personal Lines
Classification: Non-Exempt

Job Summary

The Personal Lines Client Service Specialist is responsible for assisting the PL Client Managers in the servicing and administration of the department's clients. In performing these duties the CSS is expected to meet the agency's defined standards for client service, professionalism, and work attitude. This includes adhering to the department's Service Standards and working as a valued team member in Personal Lines.

Essential Responsibilities

- ✓ Proficiency with Epic and carrier websites
- ✓ Responsible for the initial input of account, contacts, and policy detail into Epic
- ✓ Review policies in Epic as part of renewal evaluation and communicate renewal changes to PL Client Manager and Producer
- ✓ Scan and attach policy documents to Epic
- ✓ Assist with sending alerts to PL Client Managers
- ✓ Process and attach endorsements
- ✓ Process certificates of insurance, binders, FR-19's, and auto ID cards
- ✓ Follow agency procedures for processing new business, renewals and endorsements, and mail new business policies and renewal policies for agency billed clients to the customer
- ✓ Maintain Personal Lines new business log in Excel spreadsheet
- ✓ Open and distribute mail
- ✓ Bill Agency Bill renewals (Passport and Worker's Compensation policies, etc.)
- ✓ Follow up on late-pay and cancellation reminder notices
- ✓ Perform any and all other tasks related to billing accounts as needed
- ✓ Update and prepare Summary of Insurance and Marketing Summary details, including premiums, deductibles, underwriting requirements, and notes for the Producer
- ✓ Enter Claim data, report claims, and get claims number
- ✓ Attend sponsored seminars and Continuing Education activities required to maintain and enhance product knowledge, underwriting expertise and agency procedural and computer proficiency
- ✓ Secure and maintain P&C Insurance License and State Continuing Education requirements
- ✓ Performs other duties, assignments, and special projects as assigned

Position Qualifications

- Bachelor's degree preferred
- Proficiency in Excel and other Microsoft Office programs
- Willingness to use and learn all agency software
- Strong oral and written communication skills
- Ability to organize, coordinate, and direct workflow
- Ability to handle confidential and sensitive information
- Ability to exercise initiative and sound judgment