

# Winton-Ireland, Strom & Green

## Job Description

### ***Commercial Customer Service Representative (CSR)***

Reports to: Commercial Lines Supervisor/Manager  
Location: Turlock  
Department: Commercial  
FLSA Status: Non-exempt

**Summary** This position includes the complete servicing of commercial accounts after initial sale; minor sales involvement on existing accounts; assisting producers in preparing quotes for new and renewal accounts. This position requires accurate and courteous service to our fellow employees, clients, producers and company personnel. Each CSR shall grow and develop his/her talents and insurance knowledge to the highest level possible.

**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 abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

#### **Principle Duties and Responsibilities**

Directly responsible for the daily service requirements on assigned book of business including, but not limited to:

- rating and quoting new and renewal business
- binding coverage and confirming with client
- preparing and/or supervising preparation of proposals for new and renewal clients
- billing including the collection of premiums per established agency procedures
- reviewing (and processing) all applications, renewal requests, policies, endorsements and audits for accuracy
- maintaining automated and paperless files according to agency procedures
- monitoring past due accounts and contacting insured and/or producer as needed
- ordering motor vehicle reports, loss runs and other necessary documents, as required
- assisting other agency departments in securing and/or providing information necessary to issue appropriate policies in their department for which we have a mutual client
- keeping producers informed of all important activities on their accounts including being sensitive to potential problems and informing management
- keeping client TAM records, spreadsheets and summaries up-to-date
- obtaining expiration dates for policies not written by us to follow-up on and quote
- assisting other CSRs as needed, including taking calls from the client if the usual CSR is not available
- completing other essential functions as assigned

**Education and/or Experience** Associate's degree (A.A.) or equivalent from two-year college or technical school, or one to two years related experience and/or training, or equivalent combination of education and experience. CSR should have thorough understanding of insurance industry, commercial underwriting, products and coverage. CSR must be fully licensed as a Fire & Casualty Broker/Agent.

#### **Knowledge, Abilities and Skills**

- Strong organizational skills; ability to discern priority and initiative.
- Computer skills, specifically Applied TAM, Microsoft Word, E-mail and Microsoft Excel
- Excellent verbal and written communication skills as well as strong interpersonal skills.
- Mathematical Skills. Ability to calculate figures and amounts such as discounts, interest, premiums, commissions, proportions and percentages.
- Reasoning Skills. Ability to solve practical problems, interpret a variety of instructions and deal with a variety of variables furnished in written, oral, diagram or schedule form.

**DISCLAIMER** This is a shortened version of the job description listing “some” of the key responsibilities that are normal to the position. Other duties may be assigned as needs arise or as required to support the essential functions. A more detailed job description will be provided upon request to those candidates who are being considered for the position.