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# Example of Insurance Customer Service Representative Job Description

Our innovative and growing company is looking to fill the role of insurance customer service representative. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for insurance customer service representative

* Processes daily internal & external mailbox inquiries
* Identify and analyze customer needs to ensure high customer satisfaction, growth and retention of business
* Maintains accurate data in appropriate systems in order to reflect account activity
* Coordinates all service requirements and client inquiries with primary responsibility for resolving client problems as they arise, including endorsements
* Responsible for identifying exposures and communicating additional coverage needs to customer
* Stays updated and properly executes upon newsflashes, new workflows and processes
* Obtains Producer License and maintains continuing education requirements
* Follows adherence standards according to the service level agreements of our agents
* Mentor and coach CSR's on day-to day workflows and demonstrate consultative selling skills to generate cross-sell opportunities
* Responds to customer service inquiries related to renewal and service activities requiring extensive client contact via email, fax and phone

## Qualifications for insurance customer service representative

* Demonstrated proficient interpersonal communication skills
* Demonstrated ability to interpret, follow and apply standard policies, procedures and other established guidelines
* Proficient experience in Excel and Microsoft Office
* Ability to plan, organize one's time to be efficient
* Ability to maintain confidentiality with regard to customer information
* Educate customers on new and existing products, available services and resources