



Example of Customer Representative Job Description

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Our innovative and growing company is looking for a customer 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 customer representative

- Present and negotiate underwriting terms with various insurers in order to obtain appropriate conditions for the risks assessed and in accordance with the placement strategy
- Analyze proposals for terms and conditions received and prepare evaluation and comparison reports
- Promptly manage the issuance of cover notes, certificates and invoices associated with services rendered
- Prepare the breakdown of premiums for tax purposes, if applicable
- Follow up rigorously on accounts receivable
- Check insurance policies to ensure accuracy and promptly coordinate necessary amendments, if applicable
- Prepare and send documents promptly to clients
- Prepare the claims notices and report them in accordance with established internal procedures
- Respond to client-specific questions and requests for documents
- Mobilize the appropriate practice and resources from the company and its subsidiaries to provide the best services to all clients

Qualifications for customer representative

- Has no obstacle to travel domestic or abroad
- Answer correctly and in a structured way more complex questions from

- Ability to work well with others as part of a Team, excellent verbal communication, written skills, and interpersonal skills
- Capacity to read and comprehend a variety of documents, follow instructions, learn and understand airline and ticketing procedures, rules, and regulations
- Ability to adapt to change and have the ability to comprehend and keep abreast of information pertinent to the job such as special promotions, new procedures
- Ability to demonstrate good listening, written, and verbal communication skills