

2022 PERSONAL LINES CSR – LEVEL 1

Job Title: Personal Lines Client Service Representative
Supervisor: Client Service Manager
Start Date: ASAP
Compensation: \$17 - \$21 per hour, depending on experience
Schedule: 8 a.m. – 5 p.m. Monday through Friday, with OT as approved.
In the event of a catastrophe such as a hurricane, longer hours should be expected.

SUMMARY

Heidrick & Co. Insurance is a retail agency located on Sanibel Island, Florida. The staff handles property and casualty coverages for individuals and businesses located on the barrier islands of Lee County, FL and the surrounding area. Given our location, our team is highly experienced with catastrophic perils like flood and wind, as well as high-value residential clients.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

- Work with Personal Lines producers to perform policy reviews and rewrites when necessary.
- Quote homeowners/dwelling, flood, wind, auto, umbrella and other personal lines products.
- Assist clients with policy/coverage questions by phone and email.
- Performing policy changes – mortgagee changes, coverages, etc. – and communicating with insured about such.
- Documentation of all activities in our agency management system.
- Assisting with follow-up on open claims.
- Renewal of agency bill policies.

Supervisory Responsibilities:

N/A

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

Desired Skills and Experience:

- Experience in a very busy retail agency.
- Florida 2-20 General Lines license preferred. A 4-40 CSR License considered.
- Experience with Vertafore's AMS360 product is ideal, but experience with any agency management system is required.
- Excellent organizational and time management skills.

Communication Skills:

- Strong oral and written communication skills
- Highly effective listening skills

Reasoning Ability:

- Strong, independent problem-solving skills
- Ability to remain organized and detail-oriented
- Ability to manage multiple tasks with frequent interruptions

Computer Skills:

- Proficiency with Microsoft Office products, particularly Word, Outlook and Excel
- Proficient with Google Chrome and other browsers
- Ability to scan, attach documents and upload files/photos
- Ability to quickly learn Windows-based agency management system