

Cherokee Strip Credit Union Job Description

Position: Insurance Agency Customer Service Representative **Reports To:** Insurance Agency Officer

Department: CSIA **Status:** Non-Exempt

Date: April 2023 **Grade:**

SUMMARY: Under the direction of the Insurance Agency Officer, the Customer Service Representative (CSR) services Agency Clients and Prospects by providing exemplary and professional customer service with a great attitude and outgoing personality.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Promotes excellent client relations by providing prompt, efficient courteous service with a friendly demeanor and willingness to assist.
- Manages client and prospects in personal situations with confidentiality and professionalism. Acts with confidence by finding solutions.
- Manages client and prospect inquiries by phone. Answers phone by the third ring, using the standard Cherokee Strip Insurance Agency greeting. Gathering information to assist the client. If unable to assist, warm transfer member to the appropriate department.
- Initiate conversations to uncover members' financial needs beyond the immediate transaction. Actively promoting Insurance Agency products and services, educating clients of their options
 - Engage the client/prospect in conversation
 - Educating the client/prospect of products or services.
 - Ensures that all telephone requests and lobby inquiries are given a return call the same day.
- Enter clients/prospects' transactions into computer with accuracy. Resolve issues or discrepancies concerning members' accounts.
- Other duties, projects, and assignments as assigned by the Insurance Agency Officer.

QUALIFICATIONS:

Education: Equivalent to high school diploma/GED.

- **Experience:** one to three years property/casualty, life, health insurance preferred.
- **Education:** Have or have the ability to obtain Property/Casualty Insurance Customer Service Representative Licensing through the State of Oklahoma.

Knowledge, Skills and Abilities:

- Must have good written and verbal communication, interpersonal skills, analytical ability, and organizational skills.
- Ability to read, write and speak English.
- Ability to perform basic math calculations.
- Proficient use of a personal computer, along with spreadsheet and word processing applications.
- Proficient use of office equipment, such as telephone, scanner, fax machine and calculator.
- Must have good critical thinking skills.
- Ability to work independently and as a team member.

- **Work Environment:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. The noise level in the work environment is usually moderate.
- **Physical Demands:** Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel objects, tools, or controls; and talk or hear. The employee frequently is required to reach with hands and arms. The employee is occasionally required to stand, walk, stoop, or kneel. The employee must occasionally lift and/or move up to 50 lbs. Specific vision abilities required by this job include close vision, distance vision, color vision, and the ability to adjust focus.

I certify that I have received a copy of this document on the date below, reviewed the requirements of this position with Human Resources or my supervisor, understand them, accept them, and agree to perform them to the best of my abilities. I also understand this is not a contract or guarantee of employment, and that performance benchmarks may be established which I may be required to maintain. I further understand the duties and responsibilities stated herein may not be all inclusive to this position, and the priorities of this position or supervisor may change as conditions warrant.

Associate Name (printed)

Date

Associate Signature