

<b>Job Title:</b>	P&C Customer Service Representative I	<b>FLSA:</b>	Non-Exempt
<b>Division:</b>	Insurance	<b>Revision Date:</b>	2/2020

**Position Purpose:**

The P&C Customer Service Representative I position is a Property and Casualty processing and servicing role. The primary duty of this position is providing first class customer service over the phone, in writing, or in person to Midwest Heritage Insurance Services customers and internal Midwest Heritage staff.

**Essential Functions:**

**Client Relationship Management**

- Manages inbound email, phone calls, and walk-in customer service requests
- Provides sales support service to assist Producers in finalizing new business policy processing
- Ensures prompt and accurate service and processing of policy changes, claims, billing inquiries, and policy cancellations
- Demonstrates a positive, friendly, and professional attitude in an effort to build customer focused relationships with customers and employees
- Keeps the Producer and Customer Service Supervisor fully informed of all important activities, including potential problems
- Prepares and sends letters on behalf of internal staff; underwriting follow up letters, new business solicitation letters, renewal letters, etc.
- Employee may be asked to quote new, renewal, and re-write policies if business needs necessitates
- Cross-sell Midwest Heritage banking, investments, and additional insurance products / leads
- Employee may be asked to support personal lines, commercial lines, and/or farm insurance customers depending on business need

**In-House Relationship Management**

- Demonstrates a positive, friendly, and professional attitude in an effort to build customer focused relationships with customers and employees
- Demonstrates a willingness and desire to work in a team atmosphere and assist others when needed
- Reports to work when scheduled and on time

**Administration**

- Effectively manages workload to ensure efficiency and proficiency of tasks
- Effectively manages follow up activities and completes proficient documentation on all client contacts
- Properly uses agency management systems and carrier systems proficiently
- Maintains current Producer’s license, certifications, and CE requirements for each renewal period
- Attends scheduled agency and insurance carrier meetings

**Secondary Duties and Responsibilities:**

Performs other job-related duties and special projects as requested

**Knowledge, Skills, Abilities Required:**

- Must have a friendly, positive attitude and present themselves in a professional manner
- Strong written and verbal communication skills and the ability to approach people are essential
- Self-motivation, strong work ethic and the ability to build personal relationships with insurance company
- Underwriters and brokers will be essential in this position
- Must possess good customer service spirit to help customers in a timely and proficient manner
- Excellent organizational skills, work with detail, high level of accuracy, and follow-up skills
- Must be able to maintain a high degree of confidentiality
- Must have proficiency of PC with Microsoft Word, Excel, Access, Outlook and good data entry skills
- Must have the ability to analyze and understand coverages, forms, underwriting practices and policies.

**Education, Experience, and Other Requirements:**

- High School diploma or equivalent.
- One year of Property & Casualty insurance experience preferred but not required.
- Minimum of 1 year of customer service experience required.
- Must obtain Iowa Producers Insurance license within 45 days from the first date of employment OR within the first five exam attempts; whichever comes first.

**Reporting Relations:**

Accountable and Reports to: Customer Service Supervisor

Supervisor Responsibilities: None

**Working Conditions and Physical Requirements:**

- The duties of this position are normally performed in a general office setting. This is a fast paced work environment.
- This position is classified sedentary/light and requires the ability to sit for long periods of time.
- There is frequent pressure to meet deadlines and handle multiple projects in a day.
- Visual requirements include: ability to see detail at near range with or without correction.
- Must be able to perform the following physical activities: sitting for long periods, talking (in person and by telephone), hearing and repetitive motions.

**Travel:**

< 10% travel mainly local between Midwest Heritage locations and training

**Equipment Used:**

Computer (PC with Microsoft Office programs), telephone, calculator, telephone, copier, fax, and printer.

**Other Position Requirements:**

**Contacts:** This position works with Midwest Heritage employees, customers, Hy-Vee employees, vendors and outside agents doing direct business with Midwest Heritage.

**Confidentiality:** This position has the responsibility to protect the privacy and confidentiality of customers, employees and bank/insurance/financial information at all times.

In the performance of their respective tasks and duties all employees are expected to:

- Follow all state and federal regulatory requirements and complete assigned training courses within the required timeframes.
- Perform quality work within deadlines.
- Interact professionally with other employees, customers and suppliers.
- Work effectively as a team contributor on all assignments.
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.

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This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

Your signature indicates that you have reviewed this job description and understand all expectations. Please return a signed original to Human Resources for the employee file.

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**Employee Name (please print)**

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**Signature of Employee**

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**Date**