



[www.arnoldins.com](http://www.arnoldins.com)

Arnold Insurance Agency

102 Cedar Street

P.O. Box 9

Arnold, NE 69120

phone (308) 848-2215 • toll free (800) 658-0515 • fax (308) 848-2291

**Position: Customer Service Representative**

Reports to: Office Manager

### **Responsibilities & Duties:**

- The book of business that is assigned; including renewal and new business.
- Underwrite and place new accounts
- Coordinate processing a payment of claims between insured and company
- Collect premiums for assigned accounting
- Cross-sell accounts
- Providing continuing service and advice to Agency insured, clients, and producers
- Computer Knowledge and Phone skills.
- Communicate to Producers
- Respond to inquiries from Agency insured and prospects
- Assist in collections for assigned accounts by calling or writing the insured's and calls company to cancel for nonpayment if applicable.
- Complete applications and rate and quote risks for new and renewal business
- Set up new files
- Maintain account files, checking, and updating account information; purging as appropriate.
- Process miscellaneous changes, endorsements, and cancellations
- Prepare policies and endorsements for delivery and mailing
- Solicit coverage's or expiration dates for coverage's not carried by the agency
- Maintain expiration list and suspense file for assigned accounts
- Invoice accounts on all assigned accounts
- Take claims reports and forwards them to company
- Maintain claim records checking and updating information
- Maintain prospect list for new and cancelled (Preferred accounts) update and delete as required
- Call for expiration dates of prospects
- Prior to renewal, prepare key accounts for review, assemble and update entire file and account information and prepare recommendations for upgrading coverage's
- Data Entry
- Perform other functions at direction of management

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### **New Business:**

- Document the file regularly
- Does homework on account; what type of business, exposures that need to be covered, etc.
- Obtain information from prospect
- Fill out property Accord apps, cost estimators, inventory lists, etc.
- Call companies to find out who has a market for what and guidelines we need to follow.
- Maintain correspondence with underwriters in regards to additional info need, additional coverage that may need to be added, progress of application, and changes that may need to be done.
- When quote comes in, need to review in its entirety to make sure everything is quoted as requested. Review any additional endorsement that may be added feature to the quote.
- Prepare the proposal uses a Worksheet in agency management system. Present to producer for them to review. If correct proceed to make an appointment with the prospect to review the proposal. The CSR on occasion will go with the producer.
- If during the proposal, changes need to be made, the CSR will make correspondence with the underwriter in regards to changes.
- If proposal becomes a sell CSR contact company and has them proceed with policy.
- When new policy comes in, CSR reviews it to make sure it is correct, sets up the account, creates a new worksheet and prepares the account for the producer to deliver.
- Open communication line with the producer during the new business process on a daily/weekly bases depending on account.

### **Existing Business:**

- Document the file regularly. Make notations in file or any conversations that CSR has with insured regarding policy .
- Prepare renewal worksheets for annual or semiannual review in agency management system.
- Keep up on changes with company for any new changes that may effect the insured.
- Maintain and update insured's file.
- Keep up on any new changes that are occurring with the business.
- Keep up on any new changes, added features, endorsement, etc that the company may have to offer-figure premium costs if there is a change.
- File any claims that may arise during the policy period. Keep close correspondence with insured and claims dept. Follow through until complete. Update producer during this time.

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- Review inventory and update on periodic basis with insure.
- Complete any requests from company and insured concerning the policy, such as endorsements, deletions, cancellations, updated cost estimators, etc.
- Take phone calls with questions from the insured regarding coverages, payments, etc.
- Re-quote policy with another company at insured and or producer's request.
- Open communication line with the producer with any changes or updates to accounts that need to be discussed.

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