



## **Client Experience Trainer**

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### **Summary of Primary Function:**

Train newly hired CSRs. Assist CSRs with questions and guidance on policies, procedures, and transactions.

### **Essential Duties:**

- Prepare training plans for newly hired Customer Service Representatives.(CSRs)
- Train newly hired Customer Service Representatives (CSRs)
- Provide ongoing and up training to all CSRs.
- Explain policy coverage and provide details to CSRs.
- Research policy contracts to resolve issues and answer questions from CSRs.
- Assist CSRs with problem calls from customers.
- Determine what requests and phone calls should be forwarded for review by the Department Supervisor or Manager.
- Provide appropriate follow-up, when needed.
- Keep record of customer interactions, recording details of inquiries, complaints, and comments, as well as actions taken.
- Maintain a familiarity with the details of Company products and policies, and a working knowledge of where to get assistance in responding to inquiries.
- Participates in special projects and assignments.

### **Education, Work Experience and Training Requirements:**

- Associate Degree and/or 2 years previous CSR or training experience
- Excellent oral/written communication skills
- Strong organizational skills
- Proficient PC skills in Word, Excel, Access

### **Knowledge, Skill and Ability Requirements:**

- A friendly, positive, learning-oriented attitude.
- Working knowledge of MS Word, Outlook, and Excel, and the ability to learn internal software quickly and effectively.
- Excellent customer service skills.
- Ability to quickly learn details about Company products.
- Ability to effectively explain policy coverage.
- Strong written and verbal communication skills.
- Solid problem-solving skills.

- Ability to perform under pressure.
- Function effectively as a team player.
- Strong attention to detail.
- Strong analytical skills
- Ability to work overtime as business needs require.

**Working Conditions, Physical & Mental Requirements:**

Work is sedentary in nature and is performed in a traditional office environment with cubicles. Typically, the incumbent will sit comfortably while performing the work, with some walking, standing, bending and carrying of light items, such as papers, books, and files. Other physical demands in performing the essential functions of this position include: digital dexterity, hearing, seeing, and talking. Mental requirements include, but are not limited to, the ability to concentrate, take initiative, cope with stress, adapt, and stay alert in a business environment.

**Note:** This job description reflects a summary of the job and does not prescribe or restrict the responsibilities that may be assigned. This job description is subject to change at any time.