



## Customer Service Representative

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### **SUMMARY:**

Answers questions and provides customer assistance to all policyholders/agents regarding policy information via telephone, e-mail, fax, and occasionally in person.

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

- Communicates with customers through inbound and outbound phone calls, written correspondence and e-mail to ensure successful resolution of inquiries, requests for information, and policy changes.
- Explains policy coverage and provides details.
- Researches policy contracts to resolve issues and answer questions.
- Determines what requests should be forwarded for review by other departments or management.
- Provides appropriate follow-up, when needed.
- Keeps records of customer interactions, recording details of inquiries, complaints, and comments, as well as actions taken.
- Maintains 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.
- Conducts Company business in accordance with all applicable laws, regulations and contractual obligations. Behaves ethically and with integrity and always follows the principles of the Compliance Program when making business decisions. Compliance with this program is a condition of employment for every American-Amicable employee.

### **EDUCATION, WORK EXPERIENCE and TRAINING REQUIREMENTS:**

- High school diploma or general education degree (GED).
- At least two years experience in a customer service role.
- Life insurance or related industry experience strongly preferred. Or, a solid understanding of life insurance concepts from a consumer perspective.

**REQUIREMENTS: 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.**

- 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.
- Ability to work independently as well as function effectively as a team player.
- Strong attention to detail.
- Ability to work overtime as business needs require.

**WORKING CONDITIONS, PHYSICAL and MENTAL REQUIREMENTS: The working conditions, physical and mental requirements described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.**

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.