



Position: Customer Service Representative

Company: AFBA

Department: National Guard Market/FSR

Classification: Full-time/Non-exempt

General Summary:

The Customer Service Representative is responsible for promptly and accurately responding to all insurance inquiries and completing appropriate actions to provide high levels of service to customers, colleagues and market partners.

Essential Duties and Responsibilities:

- Respond to incoming calls from customers and market partners accurately and courteously
- Return calls from messages promptly
- Perform duties generated by phone calls – update all record information, make follow up calls, generate correspondence, process terminations and changes, refer leads, etc.
- Work incoming correspondence daily (mail, email, fax), updating systems and sending responses as needed
- Send various customer correspondence monthly for routine coverage actions, and process all returned forms
- Take initiative to schedule and perform assigned actions relating to coverage maintenance in appropriate systems, and work assigned cases and issues promptly
- Run and work assigned reports
- Print, proof, and mail coverage certificates as needed
- Inform supervisors of possible items to be aware of or potential and specific problems
- Offer any suggestions that might be helpful to department functioning and show initiative and offer assistance when the need is evident
- Stay abreast of policy and procedure changes and utilize informational resources
- Perform related duties as assigned or situation dictates

Education and Experience:

- College degree or equivalent work experience

Required Knowledge, Skills, and Abilities:

- Working knowledge of life insurance or the ability to learn
- Active or ability to obtain Life/Health Insurance license
- Effective oral and written communication skills
- Ability to guide conversations and use appropriate words and tone when dealing with difficult customers or situations, maintaining a professional demeanor
- Ability to accept responsibility for organizing assignments and workflow
- Flexibility in adapting to changes in systems, procedures and guidelines
- Demonstrates complete adherence to privacy laws and company privacy guidelines, and appropriate level of concern for the safeguarding all client information

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employee(s) will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments.

Essential duties and responsibilities are subject to possible modification to reasonably accommodate individuals with disabilities. This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.