



AFBA



TITLE: Customer Service Representative

COMPANY: AFBA 5Star Life LLC

DEPARTMENT: Customer Service/Operations – Staunton Office

CLASSIFICATION: Full-time/Exempt Full-time/Non-exempt Part-time

REPORTS TO: Customer Service Representative – Staunton Office

LAST UPDATED: November 2021

GENERAL DESCRIPTION:

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.
- Generate, verify accuracy of, and send member certificates of coverage daily
- Work incoming correspondence daily (mail, email, fax), updating systems and sending responses as needed
- Review and scan enrollment forms
- 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
- 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

Customer Service Representative

EDUCATION AND EXPERIENCE:

- College degree or equivalent work experience

KNOWLEDGE, SKILLS AND ABILITIES

- Working knowledge of life insurance or the ability to learn
 - Effective oral and written communication skills
 - Ability to perform routine tasks while maintaining focus and attention to detail
 - 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
-