

# **(|B|) Broadview®**

## **Insurance Agency**

### **Customer Service Representative (Insurance)**

Located in Schoharie, NY

Full-Time Hybrid Position | Job Requisition ID R3487

If you are ready to join a company that truly cares about its employees, our members, and our community then you have come to the right place!

#### **Summary of Role:**

The Customer Service Representative identifies, contacts, and develops prospective clients, and oversees client new business, following Broadview Insurance Agency and NYS practices. The position is responsible for providing prompt, accurate, and courteous service to customers and company personnel with a primary focus on service.

#### **Essential Job Functions/Responsibilities:**

Growing and developing talents and insurance knowledge to the highest level possible; providing, with a positive attitude, a high level of support in obtaining, maintaining, expanding, and servicing personal accounts.

- Handle and process new and renewal business, endorsements, and policy changes to completion.
- Provide Insurance quotes as requested in a timely manner.
- Meet sales, retention, and revenue objectives.
- Provide in-house customer service to clients as assigned and requested.
- Check new and renewal policies for accuracy in rating, typing, coverages, signatures, and input these items accurately in the system.
- Maintain a suspense system to follow up on outstanding orders, correspondence, reports, and follow up on overdue and suspense items.
- Be familiar with and follow agency E&O guidelines.
- Maintain electronic files in an orderly, up-to-date manner.
- Perform special projects at management's request.
- Other duties as needed.

#### **Minimum Job Qualifications:**

- High School Diploma or equivalent is required.
- 2-5 years customer service experience required.
- Professional designation is a plus.
- Knowledge of phones, call forwarding and transfer, computer systems and software is required.
- Ability to multi-task and handle a fast-paced environment is essential.
- Excellent communication skills and attention to detail.
- Ability to read, process, communicate and deliver customer and vendor requests in a timely manner.
- Knowledge of insurance and products is essential.
- Ability to handle, resolve, or escalate customer dissatisfaction quickly and professionally.
- Must be eligible for bonding, maintain a NY State Property and Casualty, or Agent's or Broker's license, and any required continuing education.

**Starting Compensation:** from \$20/hour, plus a competitive benefits package

**Bilingual individuals who are fluent in a second language in addition to English are highly encouraged to apply.**

**We are an equal opportunity employer. We do not discriminate on the basis of race, creed, color, national origin, religion, sex, age, veteran status, disability, genetic information, gender identity, or any other protected class.**

**Broadview FCU is committed to ensuring individuals with disabilities and/or those who have special needs participate in the workforce and are afforded equal opportunity to apply and compete for jobs. Please contact us regarding the accessibility of our Website or if you need assistance completing the application process.**

Please send resume to [talentacquisition@broadviewfcu.com](mailto:talentacquisition@broadviewfcu.com)

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