



## **Business Customer Service Representative (CSR)**

### **Summary & Objective:**

Davidson & Associates is looking for the next great addition to our team. Our Insurance Associate is a mid-level position in the world of business insurance and provides outstanding client support to existing and new business clients in a collaborative work environment. Inside sales is a component of the position, but cold calling is not expected; we are a referral agency. If you enjoy learning and have exceptional customer service, teamwork and communication skills-- we would like to hear from you!

### **Essential Functions:**

- Daily interaction with team members, clients and insurance companies
- Provide consistent and quality service of accounts by responding to client inquiries including, but not limited to the following:
  - Provides claims assistance as needed
  - Requests policy changes and corrections as needed, and processes the policy endorsements when received
  - Manages renewal process on existing clients
  - Write additional policies for existing clients
- Enter and maintain complete and accurate information in agency management system
- Onboarding new clients with mobile apps and procedures
- Manage client relationship to maintain high account retention rate
- Other duties as assigned

### **Competencies:**

- Strong organizational and time management skills
- 2-5 years of business insurance experience as a CSR
- Ability to effectively communicate; both written and verbal format
- Proficient knowledge and understanding of Microsoft Office applications
- Familiarity with an insurance agency management system (we use EPIC) is a plus but is not required
- Responsive, welcoming and effective customer service skills; relationship builder
- Proactive account management style

### **A few words about Insurance Licensing:**

The position holder will need a **WA Property and Casualty license**.

### **What can Davidson offer you?**

- A competitive compensation package including excellent benefits (i.e., 401k match, health, life/disability insurance)
- Career growth opportunities

- A fantastic office and location! Our office is centrally located in downtown **Vancouver, WA**—a short walk to restaurants, parks, coffee shops and trails
- Work that is fast-paced and goal-oriented
- A dynamic team that is supportive, friendly and inclusive
- A Company culture of giving back to the community; our agency is supportive of employee community volunteer efforts

### **Who is Davidson & Associates Insurance Agency?**

As professional advisors in an independent agency, we offer sound solutions and access to a wide variety of policies that best meet our valued Clients' needs. We have been honored as a Best Practices Agency by IIABA (Independent Insurance Agents and Brokers of America, Inc.) and received the Best of Clark County in 2018 honor from The Columbian.

### **What is it like to work at Davidson?**

Our Company culture is one of:

- The highest ethics
- Client focus
- Professionalism
- Proactive service to clients, partners and the community through gifts and actions
- Outstanding community reputation through integrity and service
- As enthusiastic contributors within our community, Davidson employees get involved

If you are interested in this outstanding opportunity, please e-mail the following to Emily McCoy at [emily@davidsoninsurance.com](mailto:emily@davidsoninsurance.com)

- Cover letter
- Résumé