



## **Insurance Customer Service Representative/ Account Manager**

### **Job Description**

Position is part of the business lines team in supporting existing business lines clients and in-house Producers. Position has daily interaction supporting and servicing a defined book of business, working with clients and carriers. Position has responsibility to effectively upsell and cross sell coverage options to meet the needs of clients. Work within team environment to ensure clients are well cared for. Position success relies on strong internal and external communication, strong computer skills and knowledge of partner carrier systems.

Our agency culture is one of education and consulting of our clients.

Flexible work from home options available.

### **Responsibilities**

- Service and manage existing commercial lines client book of business
- Perform quality work within deadlines with or without direct supervision
- Consult with insureds to round accounts and fill risk gaps
- Use discretion and independent judgment in significant matters
- Interact professionally with other employees, clients and partners
- Work effectively as a team contributor on all assignments
- Ability to effectively work in a remote or office environment
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations
- Strengthen and enhance agency relationship with our insurance company partners

### **Requirements**

- **Washington Property and Casualty insurance license required**
- Prior independent insurance agency experience servicing small to medium sized commercial lines accounts
- Detail -oriented, organized and flexible
- Able to manage customer base
- Experience working with insurer's online rating and inquiry systems
- Working knowledge of Applied's EPIC agency management system is a plus
- Strong MS office computer skills
- Highly motivated, able to work independently, and eager to take on new challenges.
- Strong technical background
- Excellent teamwork skills and a supportive member of sales team.
- Strong work ethic, able to multi-task, complete work accurately, meets deadlines and occasionally works beyond a standard workweek.
- Able to accept and give constructive feedback to team members.
- Demonstrated ability to follow office standards and procedures.

- Explain our products based on a true understanding of the clients' risk-management needs. Offer proactive solutions to fill gaps in coverage
- Excellent communication skills.
- Ability to use discretion and exercise independent judgment

## **Benefits**

- Competitive pay to include bonuses and incentives
- Work in a cohesive, High functioning, TEAM oriented environment
- Easy freeway access to office
- All Major holidays off including birthday
- Summer schedule!
- Medical for employee 100% paid
- Responsible vacation and sick time off. Managed and scheduled with team manager to confirm team coverage and client satisfaction
- First of the month after 6 months- 401k with match- 100% vested immediately
- Group life and short and long term disability benefits start 1st of the month after 90 days
- Employee Assistance Plan (EAP)
- Free Parking
- Company culture of giving back to the community and encouraging volunteer involvement
- Weekends and evenings off- Work/ life balance
- Coffee and kombucha service
- Massage chair in office
- Flex schedule with both office and remote work
- Continuing Education- pre-approved including CIC / ARM designation

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

- Cover letter
- Résumé