

Policy Service Representative Trainee

Job Summary

The Service Representative Trainee provides customer service through phone calls and incoming requests from our policyowners, agents or other customers under direct supervision. This position reports to the Call Center Supervisor.

Primary Responsibilities

- Manage large amounts of phone calls in a call center environment
- Answer customer inquiries by phone, email or written correspondence
- Process basic customer requests to include (but not limited to) beneficiary changes, assignments, review of forms and verification of coverage and update policy information accordingly
- Develop knowledge and skill base to properly apply company processes and use all systems
- Provide accurate, valid and complete information using departmental processes and procedures
- Identify and assess customers' needs to achieve satisfaction
- Acquire and demonstrate basic knowledge of all policy types
- Properly escalate difficult or complex service situations as necessary
- Meet documented, department service level agreements, quality goals and quantity goals
- Attend and participate in team and department meetings
- Assist other team members as needed
- Other duties as assigned that affect the Policy Service department

Job Qualifications

- High School diploma required, some college a plus
- One year of customer service experience required, call center preferred
- Prior insurance industry experience preferred
- Possess clear, concise oral and written communication skills
- Patient, empathetic and passionately communicative
- Customer driven and ability to adapt and respond to differing personalities
- Ability to effectively prioritize and monitor work to achieve timely results
- Ability to maintain confidentiality and adhere to privacy standards
- Ability to learn systems processes and procedures quickly
- Ability to maintain professionalism at all times
- Ability to multi-task and effectively meet deadlines
- Flexible and adaptable to changes
- Detail oriented



- Strong initiative and solid judgment abilities and skills
- Ability to work successfully in a team environment
- Proficiency in Microsoft Office Programs
- Strong mathematical skills
- Bilingual skills preferred (Spanish)

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