



Policy Change Representative

Job Summary

The Policy Change Representative provides superior customer service through phone calls and incoming requests from our policyowners, agents or other customers under minimal supervision. This role assists call center representatives with non-routine calls and reports to the Policy Change Supervisor.

Responsibilities

- Respond to customer inquiries by phone, email or written correspondence
- Resolve complex customer issues with independent research and analysis
- Process complex customer requests, including those that have been escalated and update policy information independently
- Process policy changes to include (but not limited to) reinstatements, surrenders and conversions under minimal supervision
- Demonstrate strong knowledge and application of department and company processes and systems
- Provide accurate, valid and complete information using departmental processes and procedures
- Understand and effectively interpret and communicate policy language for all policy types
- Handle customer complaints to ensure resolution and communication and appropriately escalate as necessary
- Adhere to high level of customer service in all situations
- 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

- Associate's Degree required
- Three years of customer service experience required, call center a plus
- Three years of prior insurance industry experience required, Life and/or Health preferred
- Industry education designation required, ALMI, ACS, AIRC 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
- Excellent mathematical skills
- Bilingual skills preferred (Spanish)

*College or university must be sufficiently accredited and listed in the U.S. Department of Education Accreditation Directory.

[Download an Application](#)