

# USA - Customer Service Associate, Licensed Agent - Westwood



**Job Code**  
**USA\_1015**

**FLSA Status**  
**Non-Exempt**

**Job Family**  
**Corporate Support &  
Services**

**JobFamilyGranular**  
**Customer Service**

**RestrictToCountry**  
**USA**

## Summary

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Capable of rewriting or generating new policies as part of servicing functions. Deliver effective customer service through answering and placing calls to policyholders, agents, mortgage companies and other customers and resolving inquiries.

## Primary Responsibilities

### Primary Responsibilities

- Rewrite or generate new policies
- Provide timely, accurate customer service by answering inbound calls, researching inquiries and responding to coverage, billing and policy related questions to meet service level agreements
- Advise customers by recommending and/or cross-selling available coverages and products to inform on options to meet insurance needs
- Resolve customer issues by maintaining accurate records of grievances and complaints, answering questions and escalating calls as required to ensure customer satisfaction and effectiveness of service
- Ensure insurance policy alignment with key stakeholder needs by utilizing independent judgment to accurately place coverage based on individual clients' risk exposure
- Build customer service knowledge by taking personal initiative for learning additional processes and client-specific procedures to support customers in secondary areas and provide comprehensive, well-informed responses to inquiries
- Support the achievement of productivity standards by managing a high volume of incoming calls from multiple key stakeholders and processing related activities arising from incoming requests to meet business needs and achieve service level agreements
- Knowledge of department processes and procedures
- Contribute to a positive work environment by demonstrating cultural expectations and influencing others to reward performance and value "can do" people, accountability, diversity and inclusion,

flexibility, continuous improvement, collaboration, creativity and fun

## Required Qualifications

### Required Qualifications

**Education:** High School Diploma/GED

**Experience:** 1 year relevant experience

**Licenses/Certifications:** Property & Casualty insurance license

## Preferred Competencies/Skills

### Preferred Competencies/Skills

- Rewrite/generate new policies
- Keep call logs, records, and files up-to-date and readily accessible
- Apply research and investigative techniques
- Understand customer needs and goals actively look for ways to meet them
- Communicate information in a clear, well-organized, and professional manner
- Encourage and build mutual trust, respect, and cooperation among team members
- Follow established guidelines to focus on details and complete tasks attentively and thoroughly
- Retain customer accounts via re-write of existing policies or coverage
- Escalate issues when necessary
- Show empathy and sensitivity to the experience of others
- Positive, pleasant and supportive disposition towards co-workers and colleagues
- Professional, polished, poised and positive demeanor
- Demonstrated interest in enhancing knowledge; seeks opportunities to learn and grow
- High attention to detail
- Adapt and be flexible in a complex changing environment; multi-task and handle competing priorities
- Complete required continuing education to maintain active Property & Casualty insurance license

## Preferred Qualifications

### Preferred Qualifications - Education / Specifics

**Education:**

**Education Specifics:**

### Experience

- Customer service/operations experience
- call center experience
- insurance industry experience

## Licenses/Certifications

## Preferred Knowledge

### Preferred Knowledge

- Principles and processes for providing customer service, including customer needs assessment, meeting quality standards for services and evaluation of customer satisfaction
- Basic working knowledge of relevant systems and tools utilized in area of responsibility, including carrier management systems
- Terminology, function and fundamental capabilities of common computer, software, information and communication technology devices, components, and concepts
- Basic knowledge of Property & Casualty insurance products in all states, including policy and contract language
- Basic knowledge of Property & Casualty underwriting for product areas of responsibility

## QBE Cultural DNA

### QBE Cultural DNA

Everything we do at QBE is underpinned by our DNA (which interlinks seven cultural elements) – because we know it's not just what we do that matters, it's how we do it that makes the difference. We expect all employees to role model and inspire the right behaviours that link to our cultural elements:

- We are customer-centred
- We are technical experts
- We are diverse
- We are fast-paced
- We are courageous
- We are accountable
- We are a team

All employees are expected to adhere to QBE's Code of Ethics and Conduct and apply sound risk management practices

## US Only Section

Populate travel frequency and physical demands for jobs that are located in the US

**Travel frequency:** NA

**Physical demands:** General office jobs: Work is generally performed in an office environment in which there is not substantial exposure to adverse environmental conditions. Must have the ability to remain in a stationary position for extended periods of time. Must be able to operate basic office

equipment including telephone, headset and computer. Incumbent must be able to lift basic office equipment up to 20 lbs.

### US disclaimer

#### US disclaimer

To successfully perform this job, the individual must be able to perform each essential job responsibility satisfactorily. Reasonable accommodations may be made to enable an individual with disabilities to perform the essential job responsibilities.

### Australia/New Zealand Only Section

#### Australia/New Zealand Only Section Advice / Non-Advice:

### Global Disclaimer

#### Global Disclaimer

The duties listed in this job description do not limit the assignment of work. They are not to be construed as a complete list of the duties normally to be performed in the position or those occasionally assigned outside an employee's normal duties. Our Group Code of Ethics and Conduct addresses the responsibilities we all have at QBE to our company, to each other and to our customers, suppliers, communities and governments. It provides clear guidance to help us to make good judgement calls.