

JOB DESCRIPTION

Job Title: Client Service Specialist (CSS), Commercial Risk

Reporting location: Tustin, CA

Description update: 07/2022

Supervision of others involved: Yes No

Exempt Non-Exempt **Position Status:** Full time Part time Seasonal

Company Statement:

We are focused on advocating for our clients by delivering customized insurance solutions and proactive risk management programs. We pride ourselves in providing professional, objective guidance while offering personal attention. Below are some key factors that make us stand out.

Work Environment:

We are a unique blend of youth and experience. The younger members of our team have a strong understanding of technology and how, if not managed properly, it can pose potential hazards to businessowners. Technology in business will continue to develop at a fast pace. We keep up – making sure your exposures are managed.

- Average professional tenure is 10+ years
- Paperless environment
- Cutting-edge technology

Job Summary:

Support role to assist Account Manager and Producer to meet customer needs and expectations in a prompt professional and accurate manner and to make every customer feel like they are the most important customer we service.

Job Responsibilities:

Assist Account Manager with the following activities:

- Promptly answer customer questions
- New and Renewal Marketing, including verification of application against policy
- Loss runs and loss history recap
- Print and construct proposals and stewardship reports
- Policy Checking
- Request MVRs
- Certificate or Evidence of Insurance issuance
- Completion of Binding Checklist
- Carrier Underwriter communications
- Process incoming mail
- Process all Endorsements (invoice and mail)
- Final Audits

Position Requirements:

- Current P&C License
- Attain CISR designation within 18 months of hire date. WGB to pay for classes and allow time off from work to attend classes.

Competencies:

- Act professional and ethical in all situations
- Engage in written and oral communication using proper grammar that is clear and concise with both employees and clients
- Analyze communication between employees, customers and prospects
- Quick and accurate response to clients
- Manages time appropriately
- Technical proficiency
- Always be a positive influence on the WGIB team
- Participate in process improvements

Physical Demands:

- Must be able to remain in stationary position
- Occasionally pull or lift 5-25 lbs.
- Continuous operation of computer, faxes, copier and other office equipment as needed
- Reasonable accommodations may be made to assist individuals with disabilities to perform the essential job functions.

Note: This job description is not intended to list all of the responsibilities but to provide a general description of the responsibilities for your position. Management reserves the right to assign or reassign duties and/or responsibilities for your position at any given time to fulfill operation needs.