**Job Summary:** The Commercial Lines CSR performs the essential functions of the position, which include aiding clients with service needs and making changes to existing accounts. Specific service and marketing responsibilities are required in this position. Meets service and sales delivery standards and performs essential functions to the quality and service standards developed by the agency.

**New Business:**

♣ Work as an efficient team with agency Producer to assemble, market, and place coverage for new clients. ♣ Assists clients with making coverage; uses each contact with the client as an opportunity to review the whole account, round it and market. ♣ Provides technical support to producers to benefit clients and to reach producer and agency’s strategic business goals. ♣ Prepares proposals and completes application in coordination with producers; submits applications to eligible and appropriate carriers; obtains client signatures on all applications; follows up to ensure timely receipt of quotations and policies. ♣ Attends to clients needs by producing binders, certificates, policies, endorsements, and other related items; verifies their accuracy using established agency checklist

**Retention:**

♣ Prepares summaries of insurance, schedules, and proposals as needed for account review. ♣ Re-markets renewals, contacts clients, creates renewal proposals, and handles other renewal activities in coordination with the producers ♣ Renews policies following agency standards; verifies each renewal’s accuracy; ensures that all renewals are processed. ♣ Reviews audits of policies; verifies accuracy and facilitates corrections, as needed, between client and carrier. ♣ Maintains and updates files in agency management system. ♣ Verifies policy and change information, facilitating corrections when necessary♣ Processes incoming email and mail requests, responding promptly and appropriately.

**KNOWLEDGE, SKILLS, AND ABILITIES:**

♣ Active Property and Casualty License.

♣ College education or equivalent insurance experience.

♣ Thorough, detail-oriented to manage multiple clients, tasks and requests

♣ Adequate knowledge of rating procedures, coverages, and industry operations to effectively manage, maintain, and write assigned client and prospect lists.

♣ Knowledge of insurance markets and reference to markets.

♣ Knowledge of insurance rating and underwriting procedures.

♣ Ability to carry out complex tasks with many concrete and abstract variables.

♣ Professional, committed and **self-motivated** with the ability to focus on daily tasks

♣ Proficient with Microsoft Office – Outlook, Word, Excel Working Conditions:

♣ Strong ethical values and integrity