



## JOB DESCRIPTION

**Job Title:** Client Support Representative

**Reports To:** Client Support Manager

**FLSA Status:** Non-Exempt

**Summary:** The Client Support Rep should be focused on the timely resolution of customer issues and the performance of routine tasks requested by and as a service to our clients. All issues will be assigned by the Client Support Manager.

### **Essential Duties and Responsibilities:**

- Answering Office Phone Calls
- Making Courtesy calls to agents/insured
- Email communication with insurance companies/agents
- Data Entry of inspection orders
- Handling of client status requests
- Handling of client reopen requests
- Handling of all cancellation requests
- QA of inspector cancellations
- Updating clients on order statuses using Microsoft Excel
- Resolving order ticket level client issues in a timely manner (assigned by CSM)
- Resolving complex order ticket level issues involving analysis, investigation and multiple steps including quality assurance management and field management
- Providing order ticket level client support across all product lines
- Working directly with QA Management, Field Management and Inspectors to resolve client issues
- Daily handling of home office mail and shipments
- Managing postcard notification mailing and supplies
- Perform all other duties as required

### **Competencies:**

- Mathematics - Using basic mathematics to solve problems. Ability to calculate figures and amounts such as resolution time, case per representative and call per representative.

- Reasoning Ability- Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. The ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.
- Language - Must be proficient in English. Reading, comprehending and understand the English language. The ability to write reports and business correspondence. Effectively present information and respond to questions from groups of managers, clients, customers, and the general public.
- Management of Personnel Resources - Motivating, developing, and directing people as they work, identifying the best people for the job.
- Time Management- managing one's own time and the time of others.

**Educations and/or Experiences:**

- High School Graduate/GED **or** Bachelors' degree in related field **OR** three years of equivalent work experience in Personal Lines Insurance.
- Must be able to comprehend web based workflow system technologies, email systems
- Must have experience/be proficient in Microsoft Excel
- Must be extremely detail-oriented, have exceptional time management skills and possess above-average analytical skills.
- Excellent written and oral communication skills. Must be able to read, write and speak the English language in order to communicate with and educate JMI personnel.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed above are representative of the knowledge, skill, and/or ability, and physical demands required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

This job description is a general description of essential job functions. It is not intended as an employment contract, nor is it intended to describe all duties someone in this position may perform. All employees of JMI Reports are expected to perform tasks as assigned by supervisors and management, regardless of job title and routine duties.