



# Customer Service Representative (CSR)

## POSITION SUMMARY

Tradition Mutual Insurance is currently seeking applicants for the role of Customer Service Representatives. In this position, you will report directly to the Business Development Manager. This position will provide support and assistance to our customers. You will assist in maintaining relations and exceeding customer expectations whenever possible.

## JOB DUTIES AND RESPONSIBILITIES

- Assist with processing documentation; policy checking and overall review of policies for accuracy.
- Answer calls from clients and agents and find answers as appropriate
- Maintain organized up to date client files in EPIC
- Prepare letters for clients for renewals, endorsements, etc.
- Submit change requests and other required documentation as required to underwriting.
- Participate actively in team activities/initiatives and take responsibility for self-learning; Embrace new procedures, technologies, and processes, demonstrating leadership with peers and customers, setting high standards for customer service and professionalism.
- Complete certificates of insurance and confirmation certificates
- Other duties as assigned

## EDUCATION AND QUALIFICATIONS

- Post-Secondary Education in Insurance an asset;
- An agent license will be a requirement, willing to provide educational assistance upon hiring to complete this requirement depending on the candidate.
- Interpersonal Skills – Should be tactful, compassionate and treats others with respect. Is professional in their approach and demeanor.
- Problem Solving Skills – solution focused attitude, always looking for ways of handling situations or improving on processes
- Flexible - Adapts to change and different ways of doing things quickly and positively. Eager and able to work independently or as part of a team
- Organization skills – The ability to use time, energy and resources in an effective way to meet job requirements.

**Note:** The above mentioned tasks are representative but should not be interpreted as all-inclusive of this position; Interested applications please submit your resume by email. The closing date of this posting is **January 15, 2021**. We wish to thank all that are interested, however only candidates selected for an interview will be contacted.

Please submit resumes in confidence to Ken Rush, Business Development Manager at [krush@traditionmutual.com](mailto:krush@traditionmutual.com)