

# CHALK & GIBBS INSURANCE & REAL ESTATE

## COMMERCIAL LINES

### CUSTOMER SERVICE REPRESENTATIVE

**About The Agency:** Chalk & Gibbs is a 4<sup>th</sup> generation Property/Casualty Agency located on the Crystal Coast in Morehead City, North Carolina. We have been serving Carteret and surrounding counties since 1925.

**Job Description:** Chalk & Gibbs is seeking an experienced Commercial Lines CSR. The successful candidate will be responsible for maintaining solid customer relationships by handling customer inquiries and concerns with speed and professionalism. The candidate will interact daily with customers, insurance carriers, and fellow employees while conducting specific service and marketing activities.

The ideal candidate will have insurance industry experience, strong attention to detail, and superior customer service skills. The candidate must also have excellent organizational, communication, and problem solving skills.

The candidate must:

- Provide service to existing clients related to updating policies, providing quotes, taking payments, answering questions and providing documentation.
- Service all regular and after-hour claims.
- Set appointments and/or client calls to support Producer, discuss existing policies, review liability limits and exposures, explore other coverage needs, evaluate replacement costs, round out accounts, and bind renewals.
- Work with new clients or support Producer in an effort to understand their needs, gather necessary data, research policy options, present options, finalize and bind new coverage, cancel old policies, and negotiate with carriers when necessary.
- Collaborate with team members, mentor staff, provide expertise and answer questions, and participate in formal and informal meetings as needed.
- Participate in agency marketing activities, meet with carriers, attend CE sessions and other agency functions.
- Perform administrative duties as needed such as answering phones, opening mail, and greeting visitors.

**Requirements:** The candidate will:

- Hold the insurance license required by your state and have a minimum of two years commercial lines insurance account management experience.
- Have a Bachelor's Degree or comparable work experience.
- Demonstrate strong knowledge of insurance products and usages, rating procedures, underwriting procedures, coverages, and industry operations to effectively manage, maintain, and write assigned client and prospects.

- Demonstrate strong customer focus and an excellent phone manner; display strong written and verbal communication skills.
- Possess excellent math and reading skills to accurately perform simple calculations.
- Have the ability and tact to handle difficult customer phone calls and solve complex problems without direct supervision.
- Have strong sense of urgency, attention to detail, organization, multi- tasking, and follow up skills.
- Have excellent time management skills with a personal accountability mindset.
- Have technology and computer proficiency, including agency management systems.

Please send resume with cover letter to:  
Chalk & Gibbs, Inc., P. O. Box 1079, Morehead City, NC 28557  
If you wish to email your resume, please send to [steve@chalkandgibbs.com](mailto:steve@chalkandgibbs.com)