



## First Federal Bank of Louisiana Job Description

**Job Title:** Customer Service Representative  
**Department:** First Federal Insurance Services

### SUMMARY

Under the general supervision of the Sr. Account Executive, communicates directly with both Commercial and Personal Lines Producers regarding all insurance matters. Handles all clerical/receptionist duties and maintains all machinery and supplies necessary to keep office running without interruption.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include, but are not limited to the following:

- All clerical/receptionist responsibilities to include computer tasks such as emails, applications, etc. for both Commercial and Personal Lines Producers.
- Quoting applications with some personal lines companies as deemed necessary by the Personal Lines Producer.
- Maintaining working relationship with both Commercial and Personal Lines Producers.
- Maintaining office supplies inventory.
- Maintaining/balancing the monthly commission income statement from CFIC.
- Faxing, scanning, emailing, etc all documentation to CFIC as needed.
- Tracts workload and provides statistical summaries to manager for reporting.
- Maintains file of customers' in-force policies and reviews files as necessary with producers.
- Forwards all original policy information to company as requested by carrier and uploads information, when required. Must maintain a permanent file for each application keeping the signed original, when necessary. Scan originals and store to clients Applied Vision account.
- Actively cross-sells additional policies on existing accounts, asks for referrals and solicits new business. Goal is to cover home, flood, auto, umbrella, boat, and recreational vehicles if coverages are applicable.
- Receives and forwards to CFIC or company money for premium payments as requested by Producer.
- Handles paper flow and work in a thorough and timely manner, always paying close attention to the details.
- Assist manager with special projects.

### ADDITIONAL DUTIES AND RESPONSIBILITIES:

- Performs other tasks as assigned.
- Pursue a program for personal and professional development.
- Compliance training is assigned to all Bank personnel based on their position with the Bank. Employees are required to complete all assigned training timely and in accordance with Bank policy.

**EDUCATION and or EXPERIENCE:**

- Must have a high school diploma or GED equivalent, plus two years experience working in the insurance or financial industry, or a business-related degree from a four-year college or university.
- Must be a licensed Property and Casualty agent.

**QUALIFICATIONS:**

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

- Superior communication skills. Keen understanding of accepted insurance principles. Independent judgment necessary to plan and direct activity.
- Self-starter and have problem solving capabilities. Ingenuity in analyzing and resolving complex problems and/or situations.
- Excellent organizational skills and be able to manage priorities.
- Experience with computers; competent in word processing software, preferably MS Word and Excel.
- Pursuit of technical education required and actively seeking professional Insurance designation.
- Well-groomed and professional appearance.
- Ability to drive and have a valid driver's license.

**RELATIONSHIPS:**

- High visibility and impact on client relations.
- Extensive interaction with producers.
- Internal contact with agency management, sales and support staff.

**LANGUAGE SKILLS:**

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or government regulations. Ability to write routine reports and compose clear, concise and grammatically correct letters. Ability to effectively present information and respond to questions from customers, employees, and the general public by telephone and in person. Fluency must be in English.

**MATHEMATICAL SKILLS:**

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, and percentages. Ability to apply concepts of basic algebra.

**REASONING ABILITY**

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

**PHYSICAL DEMANDS:**

The physical demands described here are representative of those that must be met by an

employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit, stand and walk; use hands to finger, handle, or feel; reach with hands and arms; and talk and hear. The employee is occasionally required to climb or balance and stoop, kneel or crouch. The employee must occasionally lift and/or move up to 10 pounds.

**ENVIRONMENT AND SCHEDULING:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions

The noise level in the work environment is usually moderate. Employee must provide own reliable transportation and have a valid driver's license. Employee is occasionally exposed to outside weather conditions.

Normal work schedule is 8:00 a.m. – 5:00 p.m., Monday through Friday, with occasional overtime. Regular attendance is required.