



Please fax your resume to 303-721-1085 or email to: Steve@RoperInsurance.com

Job Description Form

Division/Department: Sales	
Location: Roper Insurance Corporate Office	
Job Title: Customer Service Representative	
Reports to: Steve Roper	Title: President

Level/Grade: <input checked="" type="checkbox"/> Entry Level <input checked="" type="checkbox"/> Intermediate Level <input type="checkbox"/> Expert Level	Type of position: <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Contractor <input type="checkbox"/> Intern	Hours: <u>35+ / week</u> <input type="checkbox"/> Exempt <input type="checkbox"/> Nonexempt
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GENERAL DESCRIPTION

The Customer Service Representative embodies the Roper Insurance mission that provides excellence in client services to people looking for the best in health insurance coverage. Responsibilities include, but are not limited to:

- Possess an in-depth knowledge of the health and life insurance industry.
- Answer incoming calls and assist clients with policy questions, billing and claims issues.
- ‘Up-Sell’ insurance products to current clients using sales techniques to close the sale.
- Generate quotes for prospective clients using Roper’s quoting system or the carrier’s quoting system (i.e., desktop based or web based quoting).
- Obtain in-depth knowledge of each carrier and their products, and have a thorough understanding of their underwriting process.
- Obtain in-depth understanding of work processes at Roper Insurance to analyze and solve customer requests.
- Develop working relationships with each carrier’s representative and broker assistance program.
- Develop a “referral” process for your customers and manage on a regular basis.
- Occasionally meet with clients to go over proposed or new benefits package.
- Perform clerical duties to manage sales process and service requests.
- Perform regular follow-up standards to manage existing customer base.
- Willing to be compensated with a salary plus commission; benefits after 90 day waiting period
- Willing to work between current office hours 8am-5pm Monday – Thursday, and 8am-4pm on Friday

WORK EXPERIENCE REQUIREMENTS

- Proven customer service skills, friendly with a positive attitude
- Ability to multi-task and prioritize effectively
- Effective communications/relationship skills
- Manage large quantity of incoming calls
- Previous sales and customer service experience preferred
- Exceptional computer literacy with Microsoft Office 2007, including: Outlook, Word, Excel and PowerPoint

EDUCATION REQUIREMENTS

- Bachelor's degree or equivalent experience preferred.
- Must have Colorado Insurance Producer License or be willing to acquire within 30 days of employment.

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