

<b>Job Title:</b>	CSR, Agent & Marketing Support	<b>Position Type:</b>	Regular, Full-Time
<b>Division:</b>	American-Amicable	<b>Department:</b>	New Business
<b>Cost Center:</b>	148400	<b>Location:</b>	Waco, Texas
<b>Reports To:</b>	Supervisor, Agent and Marketing Support	<b>FLSA Status:</b>	Non-Exempt

**About the Company**

American-Amicable is growing and we’re adding customer service professionals to our Agent and Marketing Support Team. As a member of this client-focused team, you will provide excellent customer service primarily on phone and chat communication with our field agent partners.

American-Amicable is a part of iA Financial Group, one of the largest insurance and wealth management groups in North America. Tracing its roots back to 1910, the American-Amicable Life Insurance Company of Texas is a progressive special markets insurer. The Company offers innovative life insurance and annuity products developed to target the individual needs of protection, wealth creation, and estate preservation.

**We Offer**

- Competitive Benefits (Medical, Dental, Vision, Short- and Long-Term Disability, 401K w/ match, PTO, and more!)
- A Human Approach
- Career Advancement
- Professional Development Opportunities
- Quality Working Conditions

**Position Summary**

The primary responsibilities of this position include ensuring the department’s phone and chat queues are handled professionally, timely, and providing excellent customer service.

**ESSENTIAL DUTIES**

**Client Support – 80%**

- Manage inbound calls from independent marketing organizations (IMOs), agencies, prospective and current agents, as well as internal departments involving questions regarding application status, quotes, and other new business/marketing related matters, assuring best in class service to ensure IMO and agent satisfaction
- Coordinate with others in the Agent Support area to ensure the TAWK chat queue is being serviced in a timely manner with thorough and professional responses
- Encourage callers, when possible, to utilize the chat option for future inquiries to begin redirecting calls to chats

**Other – 20%**

- Handle various ancillary department tasks such as internal/external email requests, daily reports, ordering of underwriting requirements.
- Assist Processing area in working Workflow queue as needed, to ensure team stays within service standards
- Cross train on additional functions as time allows, to continue professional development and further cross-support within the team
- Other duties as requested by supervisor

**EDUCATION, WORK EXPERIENCE AND TRAINING REQUIREMENTS**

- High School Diploma or equivalent required.
- Two years of customer service or administrative office work experience. Previous insurance or financial services industry experience preferred.

**KNOWLEDGE, SKILL AND ABILITY REQUIREMENTS**

- Excellent phone skills and ability to provide superb customer service
- Strong computer/MS Office skills; ability to learn other software systems such as mainframe administration systems quickly.
- Knowledge of company products or ability to quickly learn.
- Strong attention to detail.
- Strong written and verbal communication skills.
- Solid research and problem-solving skills.

- Ability to perform under pressure and manage multiple assignments.
- Ability to analyze and think critically.
- Ability to keep work well organized and prioritize appropriately.
- Ability to receive direction and work with supervisors well.
- Ability to work independently as well as function effectively as a team player.
- Ability to adapt well to change, both procedural and organizational.
- A positive, learning-oriented attitude.

**WORKING CONDITION, PHYSICAL AND MENTAL REQUIREMENTS**

POSITION IS CURRENTLY REMOTE DUE TO COVID-19; INCUMBENT WILL BE REQUIRED TO COME TO THE OFFICE FOR FIRST 90 DAYS OF TRAINING OR AS PERFORMANCE INDICATES.

**The working conditions, physical and mental requirements 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.** Work is sedentary in nature and is performed in a traditional office environment with cubicles. Typically, the incumbent will sit comfortably while performing the work, with some walking, standing, bending and carrying of light items, such as papers, books, and files. Other physical demands in performing the essential functions of this position include: digital dexterity, hearing, seeing, and talking. Mental requirements include, but are not limited to, the ability to concentrate, take initiative, cope with stress, adapt, and stay alert in a business environment.

**IMPORTANT NOTE**

This job description reflects a summary of the job and does not prescribe or restrict the responsibilities that may be assigned. This job description is subject to change at any time.

