Position Title:

Updated 6/2025

Combination: CSR/Receptionist and either Office Assistant or Account Manager Assistant
(Also possibility of position of CSR/Account Manager if 3+ years full time licensed agent + other experience)
Starting Pay and Position: Dependent on education, experience and whether Insurance Licensed or not.
Note: This is a position for IN OFFICE in Stockbridge, MI only – No Work from Home.
Full Time Hours are M-F 8:30am to 5pm; (if preferred, 4 days per week may be possible dependent upon skill level.)

Objective: Exact Position and duties will depend on education, experience and our needs at time of hire.
This a multi-faceted position.
Duties will vary. Some of the main goals of the position include:

- Assisting clients by answering phones and waiting on clients at the counter.
- Doing anything possible to help the Account Managers service accounts and make more sales and to make it easy for AM's to close new business.
- Making existing clients glad they are doing business with Abbott & Fillmore Agency.
- Making prospective clients wish they were doing business with Abbott & Fillmore Agency.
- Helping with the daily things to help the office run smoothly including mail, filing, paying bills, etc.

This position is under the direction of the Agency Principal with "dotted line" reporting to the Account Managers. It includes providing support for all lines of business including Personal Lines, Life & Health some commercial lines. It also may include support other other non-insurance business lines including property rental, etc. that may come up. The description and hours worked are subject to change. The position consists of two main categories: Customer Service and Administrative Assistant. Duties will consist of any number of the items listed below and will be subject to change as needs change within the office. Training (mostly "on the job") will be provided for the duties.
If no Property & Casualty (P&C) License, then position is combination CSR/Office Assistant/Receptionist
If already licensed for P&C, then position is combination of CSR/Office Assistant/Receptionist.

Of note, there is no major difference in list of duties between Office Assistant and Account Manager Assistant. The difference is being licensed. Being licensed (i.e. Account Manager Assistant) typically correlates with needing a bit less help from others to accomplish the same tasks – thus the higher pay.

If not already licensed, if desired, we will help get licensed including paying for time and class during the first year which would then result in increase in pay upon obtaining P&C license.

I. Customer Service Rep/Receptionist Duties and either OA or AMA (depending on license)

1. Assist Account Managers with pretty much anything they can think of with various tasks including contacting clients, following up on things that require follow-up, electronic filing, updating things in Nexsure, etc.
2. Assist New Business Account Manager in taking quote information, running quotes, quote follow-up and new business follow-up.
3. As a way of dividing up work, you might be assigned specific clients via alphabet. This is just a process way of helping Account Managers more quickly know who is "go to" person for assistance. But whether or not assigned specific clients via alphabet is not a job change. So if no specific assignments at first, but then we decide to add specific assignments, that, by itself, is not a new position or promotion or pay raise. It is just an adjustment in the office to make things run more smoothly.
4. Answer the phone and direct calls.
5. Assist customers on phone calls.
6. Assist customers that come into the office.
7. Process routine changes on client policies
8. Take client payments and assist clients with billing questions.
9. Talk with prospects to take information and input that information into the computer for personal lines quote requests
10. Help cross sell accounts. For example, when client phones or stops in, ask for auto policy if we have home and no auto & vice versa, and ask about life insurance
11. Handle client requests and solicit improved or additional coverages on behalf of the Account Manager.
12. Be able to answer basic questions about coverage on personal lines policies and some questions on commercial lines policies.
13. Process various "carrier downloads" from insurance carriers.
14. Process renewals on personal lines policies.

15. Process and document endorsement (i.e. change) requests on Personal Lines.
16. Process endorsements that download from insurance carriers
17. Process insurance certificates for requests on commercial insurance.
18. Handle mortgagee requests and inquiries by telephone and/or letter.
19. Process cancellation requests and obtain reasons for canceling and document it.
20. Attempt to "save" potential cancellations or at least set up to gain back some day.
21. Take claim information from clients and submit to insurance carriers.
22. Be of service to clients better than any other service company for whom the client uses.
23. Participate in seminars and classes for skill and knowledge development.
24. Assist in developing and updating procedures.
25. Scanning documents; Filing documents electronically to client files; Perform other duties as required.

II. Administrative Assistant Duties (see daily checklist)

1. "Morning Checklist" – This is a list of things that need to be done every day.
    a. There are certain repetitive tasks that we divide up among all employees with some overlap so that they are still addressed if someone is out sick, vacation, etc.
    b. Just as one example: checking a carrier's website for cancel notices; or as simple as locking the safe.
    c. There is a
2. Make sure deposit is ready from night before (if there is one) and daily sheet entered
3. Clean up To Be Filed folder
4. Mail: Get mail, Scan, file electronically and then distribute mail as appropriate
5. Enter cancel notices & reinstatements
6. Call clients on cancel notices
7. Bank: Prepare Deposit for bank and take deposit to bank
8. Close out cash drawer at end of day
9. Use our accounting program to enter and print checks to pay bills
10. Scan and Efile non-client related mail that comes in (e.g. bills & stuff)
11. Issue checks to clients for towing/road service
12. Enter deposit info to accounting program.
13. Entering Commission Statements each month
14. E-Filing commission statements each month
15. Help keep office clean

III. Other Stuff

1. Change date on wall calendar
2. Open sign on door
3. Make coffee (if someone hasn't already)
4. Open vault – put money drawer & book out
5. Check voice mail messages and enter notes to Nexsure and forward as appropriate.
6. Faxes: Document file and Forward appropriately (also check during day)
7. Texts: Document file and Forward appropriately (also check during day)
8. Emails:
    a. Document file and Forward appropriately (also check during day)
    b. If underwriting, forward to AM, attach in Nexsure
    c. If Claim, enter info; move to claim folder
9. CSR is expected to look for things to do and to ask Account Managers for things to do when it is slow. Texting on cell phone and internet browsing is not allowed during work and personal calls should be limited to reasonable number.
10. In general cell phone usage is to be avoided while at work. You should be able to set your cell phone down away from your desk and not need to look at it except during lunch break and when you leave.

NOTE: The person in this position will not be the ONLY one performing all of the above duties and some of the duties might divvied up among different employees.