

# CBW Insurance

---

**Contact Person:** Julie Coughlin  
**Email Address:** [julie.coughlin@cbwinsurance.com](mailto:julie.coughlin@cbwinsurance.com)  
**Address:** CBW Insurance  
C/O Christiansen Insurance Agency  
Ottawa, IL  
**Phone:** 414.467.2275  
**Company Website:** <http://www.cbwinsurance.com>

**Position Title:** Customer Service Agent

---

**Opportunity Location:** Ottawa, Illinois  
**Salary/Wage:** Based on experience

## Preferred Skills:

- Solid computer skills; experience with a variety of software programs and internet
- Strong composition skills.
- Ability to set up and type accurately and with a reasonable speed, a variety of correspondence, reports and other materials.
- Excellent interpersonal and communication skills.
- Ability to maintain a positive attitude and professionalism.
- Illinois insurance license in Property/casualty or be willing to become licensed within 90 days of employment.
- Prior experience a plus, but will train the right candidate.
- Associates or Bachelor's degree in Business Administration, Risk Management or related field preferred

## Job Description

### Objectives:

1. Provide clients and prospective clients with quality service.
2. Assist the agency with prospecting and sales activities
3. Support the activity of agency producers

### Responsibilities:

1. Prepare quotes using agency tools and company resources.
2. Review applications for completeness and accuracy, referring to company underwriting guidelines to verify applicants are eligible for the programs for which they are applying.
3. Process all policy applications, changes and cancellations.
4. Review policies and changes after processing by company to insure accuracy.
5. Maintain records in the agency management system and paper files per agency guidelines.
6. Answer clients' questions regarding coverage and policy status
7. Assist with service and sales meetings as needed.
8. Assist agency producers with retention of clients
9. File loss notices with company when notification is made by client.
10. Identify and assist in rounding out accounts by selling additional lines of coverage.
11. Maintain a courteous and helpful phone demeanor when working with clients, company personnel and co-workers.

---

\*If you are interested in applying for this position, please email Julie Coughlin at [Julie.coughlin@cbwinsurance.com](mailto:julie.coughlin@cbwinsurance.com) for consideration.