



CUSTOMER SUPPORT REPRESENTATIVE (CSR) II

Job Overview

By providing top-notch care and service in a professional, knowledgeable and responsive manner to our customers, including residential property policyholders, their agents and/or producers, our customer support team goes the distance each and every day to exceed our customers' expectations. In fact, our customer support team provides crucial customer communication and administrative support and assistance to four key teams within Cabrillo Coastal and Harbor Claims: 1) admitted lines underwriting 2) surplus lines underwriting 3) sales and 4) claims. To that end, our customer support team members may spend much of their time actively communicating with our customers by performing critical customer-focused duties, such as researching and responding to new or current customers' telephone and email inquiries and/or handling first notice of loss (FNOL) telephone and/or email contacts. Additionally, they may provide invaluable administrative support related to servicing our customers in a variety of different ways, such as assisting in ensuring the efficient and correct issuance and appropriate maintenance of our customers' policies; assisting in ensuring new agents are properly appointed and current agents' information is consistently maintained; creating and distributing sales and marketing flyers; and assisting in ensuring the proper set-up, maintenance and upkeep of accurate, complete, current and regulatory-compliant claims files.

Our CSR II's bring varied and interesting backgrounds to the team, demonstrate a proven track record in the customer service field and are also fully dedicated to the Company's mission of providing exceptional customer service to each and every customer. Depending on business requirements and our Company-wide customer needs at any given time, a CSR II may be assigned to focus on serving our admitted lines and/or surplus lines customers and agents, our claimants and/or our new agents and/or producers in designated states/territories. In addition, to ensure the highest level of service and to maximize responsiveness for our customers, a CSR II may also be required to prioritize his/her efforts on either customer communication, via telephone and email contacts, or to completing a wide range of routine to more difficult processing tasks.

Most of our employees on our customer support team, including our CSR II's, are in positions that are included in our CSR progressive job series, comprised of CSR I, II and III. By utilizing a progressive job series, our CSR's are able to learn and consequently earn advancement on the customer support team and in the Company. We provide clear criteria that defines what represents demonstrated mastery at each level. Once an incumbent has mastered that position in the progressive job series, he/she, with his/her customer support team leader's -- and senior leader's -- active input and agreement, is eligible to advance to the next level in the series, increasing his/her responsibility and pay levels as a result.

The other positions on our customer support team include our customer support team leaders and customer support team specialists. Both positions require incumbents who are exceedingly well-versed in – and passionate about – customer service and additionally require incumbents with a remarkable understanding of, deep appreciation and respect for and ability to flourish in the Company's unique culture and work environment. Our customer team leaders serve a vital role in our Company's success by utilizing their demonstrated and dynamic leadership strengths to provide front-line day-to-day coaching, supervising &

leading of assigned CSRs and/or Operations Assistants, while also continuing to carry out their respective day-to-day customer service duties as “working” team members. Comparable to our customer support team leaders, our customer support team specialists are also expected to carry out their assigned day-to-day customer service duties as “working” team members, while also continually demonstrating exceptional technical knowledge about their “niche” areas of customer-focused expertise. They serve as the “go to” for the customer support team in those “niche” areas and/or as the team member who, at a moment’s notice due to fluctuating business needs, can also be open, flexible, willing and adroitly able to shift from one area (underwriting, surplus lines, claims and/or inside sales) to another to provide outstanding assistance. Our team specialists are expected to train team members on a recurring basis by teaching new hires how to do things “our way” (aka, the right way the first time), teach current team members about new information and/or tasks and/or educate multiple team members on a large-scale, even Company-wide, basis about a discipline in which the incumbent demonstrates proven skill and knowledge. Finally, both our team leaders and specialists may actively contribute to or spearhead a myriad of special projects producing important results and positive impact for the Company.

Job Responsibilities

In the spirit of our Company’s mission, values and culture, the duties listed below serve as representative illustrations of the various types of work that may be performed by our Customer Support Representatives. Depending on our business needs, we will, in most cases, require our Customer Support Representative II’s to perform work as outlined below in one or two of the key teams (e.g. Admitted Lines AND/OR Surplus Lines AND/OR Inside Sales AND/OR Claims) as outlined below. Additionally, we may also expect our Customer Care Representatives to carry out other responsibilities that are similar, related or a logical assignment to this job class.

Cabrillo Coastal Admitted Lines and/or Surplus Lines Underwriting Communication: Regularly communicates with Cabrillo Coastal customers within designated levels of authority and with general supervision; positively represents Company in telephone and email interactions and provides exceptional customer service to our external customers, such as agents, producers and policyholders, as applicable and per specified Company guidelines, Company quality and time standards and Governmental regulations; appropriately and correctly responds to an increasing variety of customers’ routine to more difficult product, service, underwriting requirements, and/or other related inquiries and issues.

Cabrillo Coastal Admitted Lines and/or Surplus Lines Underwriting Administration: Obtains and maintains customer information within levels of authority and with general supervision; accurately processes endorsements, which includes a variety of routine to more complex changes; quotes deductible changes, as authorized; prepares and assists in processing new business submissions, completes underwriting referrals within designated time frames; processes standard cancellations as authorized; maintains assigned Cabrillo Coastal files and records, including spreadsheets and folders; sorts and indexes Cabrillo Coastal emails; sorts Cabrillo Coastal and/or Claims mail and/or researches and updates return mail; performs other assigned data entry and administrative tasks per specified Company guidelines, Company quality and time standards and Governmental regulations.

Cabrillo Coastal Inside Sales Communication: Regularly communicates with newly appointed Cabrillo Coastal customers within designated levels of authority and with general supervision; positively represents Company in telephone and email interactions and provides exceptional customer service to newly appointed agents and producers; as applicable and per specified Company guidelines, Company quality and time standards and Governmental regulations, appropriately and correctly responds to a wide variety of new agents’ commission, application, contract and/or other related inquiries and issues.

Cabrillo Coastal Inside Sales Administration: Obtains and maintains newly appointed agent or producer and current customers’ sales-related information within designated levels of authority and with general

supervision; processes new applications; enters agent appointment and agent commission rates information into Company system; assists in development of Company sales, marketing and communication materials for targeted agents, including flyers, brochures and/or informational materials; assists in development of and/or maintains and/or updates sales presentations, such as PowerPoint presentations; maintains agent and sales files, contract and records, including spreadsheets and folders; performs other assigned data entry and administrative tasks per specified Company guidelines, Company quality and time standards and Governmental regulations.

Harbor Claims Communication: Regularly communicates with Harbor Claims claimants and/or third party representatives within designated levels of authority and with general supervision; positively represents Company in telephone and email interactions and provides exceptional customer service to our claimants and/or third party representatives; in first notice of loss (FNOL) interactions, clearly communicates with agents, claimants or third party representatives to obtain and provide timely and complete FNOL information and next steps.

Harbor Claims Administration: Obtains and maintains claimants and claims-related information within designated levels of authority and with general supervision; initiates the claims handling process and sets up claims files; reviews Harbor Claims checks and back-up prior to distribution; maintains assigned Harbor Claims files and records, including spreadsheets and folders; sorts and indexes Harbor Claims emails; sorts Harbor Claims mail and/or researches and updates return mail; performs other assigned data entry and administrative tasks per specified Company guidelines, Company quality and time standards and Governmental regulations.

For All:

Efficiently and effectively utilizes Company's information systems and software programs in carrying out all designated responsibilities outlined above.

Actively contributes as a member of the Company team by providing assistance and support to assigned claims, underwriting, sales, customer support, product and/or other team members.

Dynamically enhances Company's success by taking advantage of learning and development opportunities and personally integrating positive actions to improve individual performance.

Participates in, assists with and/or carries out responsibilities for "special" Company projects, as directed.

Skills and Expertise

Qualities: quality-oriented; service-oriented; detail-oriented; self-starter; team player; multi-tasker; adaptability; flexibility; strong work ethic; positive "can do" attitude; coachable; dependable.

Strong skill sets in the following areas: organization; problem analyses/solving; active listening; conflict resolution; oral (with an emphasis on telephone) and written (with an emphasis on email) communication; interpersonal communication; information analyses; keyboard entry speed of 45 WPM or more.

Strong knowledge of: business writing, grammar and punctuation rules; telephone and email business etiquette rules; desktop computer operations; standard business software and web-based engine operations (e.g., Microsoft Word, Microsoft Excel, Microsoft Outlook and Internet Explorer).

Licenses, Education and/or Experience

Current 4-40 customer service representative and/or current 6-20 adjuster license or willingness to obtain within 6 months of hire.

Two or more years of customer service and/or call center experience or equivalent post-high school education.

Fluent in Spanish is a plus.

The Details

Full –Time

Monday-Friday, 8:00 am – 5:00 pm

Some CSR's schedules will vary to ensure business requirements and customer needs are met or exceeded.

Non-Exempt Position

Competitive Benefit Package offered, including health, dental and vision care.

About Cabrillo Coastal

Offering residential property insurance products in places exposed to hurricanes is one thing. Doing it with excellence and *specializing* in hurricane exposed property is entirely another. That's what we do. Through sophisticated pricing techniques, quality and timely claims handling, careful reinsurance pricing, experienced underwriting and a friendly staff, we provide the quality service and competitive pricing our customers deserve.

We offer our products in Florida, New York, New Jersey, Delaware, Maryland, South Carolina, Mississippi, Virginia and Rhode Island and will soon have products up and running in North Carolina, Louisiana and Alabama. Our headquarters are located in Gainesville, FL, and we have an additional underwriting-focused office in Horsham, PA.

We work in an entrepreneurial, team-oriented and results-focused culture, which also provides the stability of being an established Company that is highly respected and trusted by its policyholders, agents, insurance carriers, re-insurers and insurance regulators. We are currently a team of 100+ employees who are encouraged and supported to challenge ourselves and each other to learn and grow within the Company, while sharing in Company profits. We strongly believe in hiring smart, motivated people who want to join us, roll up their sleeves and stay around in order to make a positive difference. Our exceptionally low turnover rate reflects that Cabrillo Coastal is full of people who are happy doing what they do.

If you are "smart with heart", then this is the place for you. We welcome your interest and look forward to communicating with you.