



## **The Customer Support Job Family**

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 three key teams within Cabrillo Coastal and Harbor Claims: 1) admitted lines underwriting 2) surplus lines underwriting and 3) 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 and assisting in ensuring the proper set-up, maintenance and upkeep of accurate, complete, current and regulatory-compliant claims files.

Most of our employees on our customer support team 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, 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 or claims) 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 participate in or spearhead a myriad of special projects producing important results and positive impact for the Company.

In line with our progressive job series, team specialists may be eligible to “learn and earn” the position by proving mastery of a wide range of advanced requirements, as well as a demonstrated ability to effectively teach and train. Team leaders are selected through a competitive interview and selection process, which may include the significant involvement of current team members.



## **CUSTOMER SUPPORT TEAM LEADER**

### **Job Overview**

Our customer support team leaders are seasoned customer service professionals who are also charged with the day-to-day leadership and supervision of an assigned customer support team. In fact, our customer support team leaders serve a vital role in our Company's success by utilizing their demonstrated and dynamic leadership strengths to focus their efforts on front-line day-to-day coaching, supervising & leading our CSRs, while also continuing to carry out their respective day-to-day duties as "working" team members. In other words, depending on our business needs and resulting assignments, our customer support leaders also continue to "lead from the front" by focusing on providing gold-standard service to admitted lines or surplus lines customers in assigned regions or specialty areas.

### **Job Responsibilities**

Plans, organizes, supervises and evaluates the performance of assigned members of the customer support team; with team, develops, implements and monitors work plans to achieve Company's mission, goals and performance measures; supervises, participates in developing, recommends, implements and continually works to improve work programs, plans, processes, procedures and tools (i.e. manuals) applicable to team responsibilities in order to achieve or exceed Company goals and Company quality and service standards; participates in the selection and hiring of team members in accordance with Company's principles, practices, business needs and mission; ensures appropriate and efficient staffing levels; organizes and schedules team to ensure business requirements are met or exceeded.

Supervises, monitors and evaluates the performance of assigned team members; assists in establishing team's results-oriented performance goals and requirements and individual team members' growth and development targets; regularly monitors performance and provides coaching for performance improvement and development; recommends career advancements and other rewards to recognize performance; recommends disciplinary action, up to, and including, termination, to address performance deficiencies, in accordance with Company policies.

Provides leadership and works with unit to create and foster a high performance, service-oriented work environment that supports the Company's mission, objectives and service expectations; provides leadership and participates in programs and activities that promote a positive team environment.

With senior leaders, other team leaders and/or assigned team specialists, actively assists and participates in providing and/or coordinating ongoing team training; ensures that team members engage in useful learning and development opportunities.

As assigned, may conduct random, in-depth audits of individual team members' work product (including call recordings and/or email reviews) and/or desk work flow/evaluations to ensure compliance with Company's established practices and quality and service expectations and to identify additional training opportunities, individually and/or team-wide; when issues are present, effectively communicates with individual, other team leader/s and manager and follows-up to ensure that appropriate, immediate and long-term action is taken to rectify any potential or recurring issues; assists in development of team audit practices and procedures; performs and/or reviews results from quality assurance audits, as directed.

Regularly communicates and monitors team members' communication with Cabrillo Coastal customers; positively represents and ensures team 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 and ensures that team members' accurately and professionally respond to the full spectrum of customers' product, service, underwriting requirements, and/or other related inquiries and issues, including those that may be difficult, unique or escalated.

Regularly communicates with and monitors team members' communication with Harbor Claims claimants and/or third party representatives; positively represents and ensures team members positively represent 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 and ensures team members' accurate and professional communication with agents, claimants or third party representatives to obtain and provide timely and complete FNOL information and next steps.

Ensures customer and other assigned Cabrillo Coastal information is obtained and maintained; oversees preparation of and reviews underwriting and customer support weekly count and/or daily production reports; accurately processes all types of endorsements within authority level; processes effective date changes; processes agent of record change requests; reviews alarm certificates to add CSB and/or CSF; books transfer credits; completes internal re-writes; quotes add, remove or amend coverages; quotes add or remove wind mitigation credits; completes underwriting referrals; processes cancellations; oversees maintenance of and maintains assigned Cabrillo Coastal files and records, including spreadsheets and folders; oversees sorting and indexing of Cabrillo Coastal emails; supervises sorting of Cabrillo Coastal Claims mail and/or researching and updates of return mail; oversees performance of and performs other assigned data entry and administrative tasks per specified Company guidelines, Company quality and time standards and Governmental regulations.

Ensures surplus lines' and admitted lines' pre-underwriting tasks are completed in a timely and accurate manner; provides ongoing guidance and direction to team members involved in the preparation of new and renewal surplus lines and/or admitted lines homeowner's insurance business; monitors timely, accurate and thorough research, updates to and organization, maintenance, preparation and distribution of pre-underwritten files to appropriate surplus lines and/or admitted underwriting team members; assists in developing, coordinates and oversees improvements to pre-underwriting work flow processes and procedures to ensure Company underwriting and regulatory-required time and service expectations and standards are met or exceeded.

Ensures customer and other relevant Harbor Claims information is obtained and maintained; actively participates in CAT planning and preparation; supervises preparation of and prepares Harbor Claims daily claims reports; oversees initiation of and/or initiates the claims handling process and sets up claims files; assigns and/or, when required, re-assigns claims; appropriately uses claims rotation spreadsheet in assignment of claims; as required, communicates with claims and senior management on certain types of claims; determines if claim has representation; oversees review of and/or reviews Harbor Claims checks and back-up prior to distribution; supervises maintenance of and maintains assigned Harbor Claims files and records, including spreadsheets and folders; oversees Harbor Claims email and mail management; supervises performance of and 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 and ensures the effective and efficient utilization by assigned team members of Company's information systems and software programs in carrying out all designated responsibilities outlined above; troubleshoots website quote/bind or other pertinent issues; reviews assigned permissions, as appropriate.

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.

Coordinates, oversees, participates in and/or carries out "special" projects either independently or as member of a group, 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; financial orientation; collaborator; strong leadership.

**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; time management/working under tight deadlines; information and financial analyses; creation of marketing materials; keyboard entry speed of 45 WPM or more; leading, coaching and mentoring.

**Strong knowledge of:** effective leadership philosophies, principles and practices; 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). MS Access and MS PowerPoint a plus.

## Licenses, Education and/or Experience

**For external candidates applying for a posted customer support team leader position:**

Current 4-40 customer service representative and/or current 6-20 adjuster license.

Six or more years of highly demanding customer service and/or call center experience in residential property insurance lines of business. Post-high school education may also be considered in lieu of some of the required experience.

Fluent in Spanish is a plus.

Demonstrated leadership abilities are required. Significant supervisory experience is highly desirable.

**In order for an internal customer support representative to be selected as a customer support team leader, he/she must participate in a formal selection process and, at the minimum:**

Demonstrate strong competency in all of the qualities, skill sets and knowledge bases listed above under **Skills and Expertise; AND**

Maintain a current 4-40 customer service representative and/or current 6-20 adjuster license **AND**

Demonstrate mastery of and/or a strong foundation in all areas specified for the Customer Support Representative II in the *Customer Support Mastery Training Log* located on the shared drive -- I:\Operations\CST Team Training Log **AND**

Demonstrate an ability to complete all tasks outlined for the Customer Support Representative II in the *Customer Support Mastery Training Log* located on the shared drive -- I:\Operations\CST Team Training Log.

## The Details

Full –Time

Monday-Friday, 8:00 am – 5:00 pm

Some team leaders' schedules will vary to ensure business requirements and customer needs are met and exceeded.