1. Provided primary customer support to internal and external customers in fast-paced environment.
2. Incorporated cross-selling and upselling techniques to generate sales and profits and increase referral retention rates
3. Answered incoming phone calls to articulate product value to prospective customers and support current policyholders.
4. Consulted with outside parties to resolve discrepancies and create effective solutions.
5. Encouraged policyholders to submit referrals to increase client base.
6. Adhered to underwriting, rating and compliance criteria and guidelines to determine associated financial risks.
7. Directed incoming calls to internal personnel and departments, routing to best-qualified department.
8. Maintained current product knowledge to meet customer needs and increase sales.
9. Documented customer contact in [Software] to maintain record of customer interactions and elevate quality of service.
10. Shared knowledge and expertise with co-workers to foster awareness and increase staff productivity.
11. Submitted claims and initiated damage appraisal to facilitate claims process for policyholders.
12. Suggested new procedure to persuade cancelling customers to stay with company, resulting in [Number]% decrease in cancellations.
13. Initiated outbound customer calls to review policy reviews and late payments to avoid lapse in coverage.
14. Verified and updated customer contact details in [Software] to build and maintain accurate customer database.
15. Responded to customer requests for products, services and company information.
16. Acted as [Type] subject matter expert, answering internal and external questions and inquiries.
17. Evaluated customer information to explore issues, develop potential solutions and maintain high-quality service.
18. Liaised with customers, management and sales team to better understand customer needs and recommend appropriate solutions.
19. Processed customer premium payments using [Technique] to simplify customer payment process.
20. Reviewed and adjusted customer coverage levels to address, identify and resolve customer conflicts.