

JOB TITLE: Account Manager
REPORTS TO: Vice President
FLSA STATUS: Exempt



POSITION:

Account Manager

Summary

Manage an assigned book of business with a diverse clientele across various industries. Accounts may be fully insured, partially self-funded, self-insured or captive. Work within a team and be responsible for customer satisfaction, problem resolution, and retention of clients as well as supporting agents in sales and service.

Essential Duties And Responsibilities

- On-boarding new clients
- Respond to inquiries from clients and carriers.
- Complete RFP and request census.
- Initiate vendor renewal request with Service Representative. Coordinates process with agent to negotiate all renewal rate relief.
- Prepare Open Enrollment benefit guides, checklists, forms, summaries, presentations, Brainshark's and webinars.
- Communicate group enrollment process with Service Representatives to include: benefit guides, checklists, forms, summaries, or others as needed..
- Conduct OE meetings, health fairs, webinars
- Participate in the pre-renewal, renewal, and post renewal meetings.
- Educate clients on compliance.
- Be consultative and interchangeable with the agent
- Travel to client sites

Additional Responsibilities

- Update agents on client activity, issues, and opportunities to develop further business.
- Build relationships with client contacts and provide recommendations for plan changes, claims issues, and renewal options.
- Learn new software programs as needed.
- Attend all scheduled team and staff meetings.
- Attend educational and product seminars.
- Participate in special projects as required.
- Overnight Travel as needed for client meetings, conferences, etc.
- Other duties as assigned.

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

Client Service Orientation – Makes extra effort to understand clients underlying needs and expectations. Follows up on client inquiries, issues, and feedback. Strive to be a 'trusted advisor' to clients.

Teamwork - Balance team and individual responsibilities; Exhibit objectivity and openness to others' views; Give and welcome feedback; Contribute to building a positive team spirit; Put success of team above own interests; Support everyone's efforts to succeed.

(Continued)

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Communication – Communicate effectively and persuasively in any situation - verbally and in writing; Thoroughly digest and interpret information and request clarification when necessary; Listen carefully and respond to questions/communications concisely; Share knowledge and ideas and collaborate effectively with others; Actively participate in meetings.

Quality - Demonstrate accuracy and thoroughness; Focus on quality from beginning to end of assignments to ensure deliverables are met in a timely and professional manner; Apply provided feedback and actively seek solutions to improve quality of work and performance.

Dependability - Follow instructions and respond to management direction; Take responsibility for your own actions and follow-through on commitments; Be willing to commit to extended hours of work for required client deadlines and/or to achieve work-related goals; Complete tasks and projects on time and notify appropriate contact if an alternate plan is necessary; Work independently, accept accountability, set personal goals, remain focused under pressure, be acceptant of change when necessary, and meet attendance/punctuality and responsibility requirements.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Education and/or Experience

- High School degree and 3-5 years related experience.
- Insurance industry or TPA experience preferred.
- Active Life and Health license or obtain within 90 days of employment

Time Management Skills

Ability to prioritize, organize and manage multiple assignments

Communication Skills

Excellent oral and written communication skills

Computer Skills

- MS Office Suite
- Brokerage Builder / ZyWave software experience.
- Office Equipment – Fax, Copier, Scanner, Printer, Cell Phone

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this Job, the employee is regularly required to sit; use hands to type as well as talk and hear. The employee occasionally stands and walks. The employee must occasionally lift and/or move up to 20 pounds. Specific vision abilities required by this job include close vision and ability to focus on computer screen and paperwork.

SUBMIT RESUME / PORTFOLIO