



POSITION:

Account Manager - Employee Benefits

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

- Ability to on-board 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 (OE) benefits guides, checklists, forms, summaries, presentations, Brainshark's and webinars.
- Communicate group enrollment process with Service Representatives to include: benefits guide, 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 Advisor.
- Travel to multiple client locations.

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/Quality Focus – Anticipate, monitor and meet the needs of clients, and respond to them in an appropriate manner. Demonstrate a personal commitment to identify clients' business needs and continually seek to provide a trusted advisor level of service.

Adaptability – Adjust scheduled work to accommodate an ever-changing environment; Triage the multiple demands and competing priorities by gathering relevant information and applying critical thinking skills; Seek wisdom and insight from SSG team members when needed.

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.

continued

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REPORTS TO: Vice President

FLSA STATUS: Exempt



Teamwork - Balance team and individual responsibilities; Exhibit objectivity and openness to others' views; Provide and be acceptant of feedback; Contribute to building a positive team culture; Support the organization as well as your teams' efforts to succeed.

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 and communications concisely; Share knowledge and ideas and collaborate effectively with others; Actively participate in meetings.

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 at a high level. 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.

Soft Skills

- Demonstrates effective leadership, creativity, and problem-solving skills and adapts to working within a team.
- Excellent oral, written and organizational skills.
- Ability to efficiently organize work and manage multiple competing priorities in order to meet client deadlines.

Computer Skills

- Extensive experience working in MS Office Suite programs, particularly, PowerPoint, Word, Excel, etc.
- Brokerage Builder / ZyWave software experience
- General use of standard office equipment, such as computer, keyboard, calculator, printer, etc.

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: employee is regularly required to sit; use hands to type as well as speak 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 having the ability to focus on computer screen and paperwork and work on a computer for a prolonged amount of time.

SUBMIT RESUME