

JOB TITLE: Client Service Representative

REPORTS TO: Vice President

FLSA STATUS: Non-Exempt



POSITION:

Client Service Representative

SUMMARY

Must effectively work within a team and is responsible for: client satisfaction; problem and issue resolution in a timely manner; Account Manager lead support; and maintaining a supportive client relationship. Additionally, accountable for recordkeeping of clients account information in company database.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Respond to client and vendor inquiries in a timely manner.
- Process client enrollments, terminations, changes and ID requests into vendor systems and internal CRM database.
- Communicate the status of activities/service issues to client contacts and Account Managers.
- Maintain database by updating and renewing plan information, rates and additional information such as: saving enrollments, benefit summaries (SBC's), group documentation/forms and emails.
- Coordinate documentation for new business implementation: group plan changes, maintenance change requests, and vendor submission for processing and follow up.
- Collaboratively work with Account Managers to maintain renewal activity calendar and past due renewal status list, and track rate renewal certification with vendors as well as maintain document status on database.
- Research and resolve billing, claim and other member service issues as directed by Client, Account Manager and Benefit Advisor.

Additional Responsibilities

- Build rapport with client contacts and vendors.
- Audit invoices after open enrollment has been processed.
- Update Account Managers and Benefit Advisors on client activity, issues, and opportunities to develop further business.
- Attend webinars and events on a variety of industry topics, new vendor products and services, and compliance related topics that may affect clients.
- Learn new software programs as needed.
- Attend all scheduled team and staff meetings.
- Participates in special projects as required.
- Other duties as assigned.

COMPETENCIES

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

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

(continued)

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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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience

High School degree and 1-year related experience.

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.
- General use of standard office equipment

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.

WORK ENVIRONMENT

The work environment characteristics described here are representative of a normal office environment. The noise level in the work environment is usually moderate to low.

SUBMIT RESUME