



EMPLOYEE BENEFITS ACCOUNT MANAGER JOB DESCRIPTION

General Description: This position serves as the primary service contact for complex clients and is responsible for client satisfaction, including some strategic planning responsibilities. This position is expected to consistently provide excellent client service and leadership to accounts, as well as represent client needs and goals within the organization to ensure quality.

Key Responsibilities

- Individual would manage a complex book of business comprised of clients of various funding methods, advanced contract features and structure that requires a higher level of experience and technical expertise.
- Responsible for acting as the primary contact between clients and insurance carriers and retaining clients through customer service which includes open and clear communication channels with clients, producers and internal partners. Ensure accurate and timely responses occur between all parties.
- Ability to lead client meetings and provide “on the spot” strategic guidance and financial performance information in conjunction with or independently from the Benefits Producer.
- Negotiate final terms and conditions with carriers as needed.
- Responsible for reviewing client materials and providing direction to Internal Partners on strategic vision, edits or next steps in conjunction with or independently from the Benefits Producer.
- Identify problems, summarize and develop strategic solutions with the client by incorporating the company’s culture, mission and future staffing needs into our recommended strategic solutions.
- Expected to attend, and lead as needed, client meetings on site at their location(s).
- As needed, preparation of standard and “one off” materials needed for client meetings including but not limited to agendas, reports, calendars, custom reports, etc.
- Expected to initiate regular client contact as established by the client service calendar and renewal timeline. Client contact will include all methods: electronic, telephonic and in-person.
- Educate, advise and stay informed for clients on all Compliance topics including, but not limited to, ERISA, COBRA, FMLA, 5500s and Health Care Reform.
- Communicate due dates, timelines and expectation to clients and partners.
- Install new group insurance contracts for existing clients or new clients effectively utilizing resources to match client needs.
- Administer renewals including preparing appropriate contractual changes.
- Conduct on-site meetings to communicate to employees and/or administrator details about their benefit plans.
- Develop employee memorandum drafts for client to communicate the following; annual renewal changes, enrollment procedures, miscellaneous benefit changes and/or clarifications.
- Provide resolution support and oversight of employee issues such as enrollment and billing issues. When the Benefit Resource Center is not engaged, support with escalated claim issues is also expected.
- Develop and maintain excellent carrier relationships.
- Provide leadership to the team that promotes teamwork by sharing experiences, assisting others when help is needed and maintaining a positive and professional attitude.

- Ability to work on additional projects that support the overall development and advancement of the Employee Benefits team.
- Other miscellaneous duties as assigned.

Qualifications Required

- 5+ years' experience in Employee Benefits industry or related marketplace
- Exceptional customer service skills
- Ability to perform large work volumes with high degree of accuracy
- Strong technical knowledge of Employee Benefits insurance products
- Must be a self-starter, imaginative and creative with outstanding communication skills, both verbal and written.
- Strong attention to detail
- Strong presentation skills
- Refined verbal and written communication skills
- High level of computer literacy including working knowledge of Windows, Excel, Word and PowerPoint.
- Ability to delegate to technical support staff
- Excellent time management and prioritization skills
- Keep informed and further industry education, new product knowledge, legislation, coverages and technology to continuously improve knowledge and performance with the ability to articulate and educate those around them.
- Ability to participate and support the development of fellow service team members as needed.
- Ability to contribute to a collaborative environment by consistently demonstrating teamwork, high motivation, positive behavior and effort to achieve goals and objectives
- Ability to perform tasks with a sense of urgency and ability to work with and meet deadlines
- 3 references from prior employers/direct reports or insurance carrier representatives
- Active Florida 2-15 license
- Exceptional personal character, including a strong work ethic, positive attitude and willingness to assist teammates at all times