



POSITION DESCRIPTION

NAME		DEPARTMENT:	Emerging Markets; Health & Welfare
TITLE	Benefits Specialist	STATUS:	Full-Time
REPORTS TO:	Executive Vice President, Emerging Market	CLASSIFICATION	Exempt

JOB SUMMARY/ORGANIZATIONAL IMPACT: The Benefits Specialist provides exceptional customer service to clients and supports account managers by securing carrier proposals, creating Excel spreadsheets, and preparing presentations for clients and prospects. This position is essential to the organization's success by performing due diligence that is necessary in determining the most suitable benefit options available to maintain and secure new business.

RESPONSIBILITIES/ ESSENTIAL FUNCTIONS:

- Ability to show initiative, multi-task, and work independently in an exciting, fast-paced environment.
- Request and review renewal data from clients, prospects and carriers and develop a request for proposal in coordination with account managers for applicable lines of coverage.
- Coordinate timelines with carriers, TPAs, producers, account managers, clients, and prospects for presentations and plan updates.
- Request, review for accuracy, evaluate and negotiate proposals from carriers to prepare Summit's presentation and recommendation based on the account managers objectives.
- Prepare presentations and communications according to standardized departmental guidelines and brand standard guidelines.
- Submit plan changes, enrollments, and other necessary documentation to carriers based on employer's renewal decisions, and coordinate with Account Manger to finalize a successful implementation process.
- Prepare enrollment and plan communication materials, such as benefit trifold, notices, benefit guide, etc.
- Actively stay informed of insurance products, plans, representatives and insurance regulations change through industry communications, meetings, webinars and continuing education. Attending all meetings and taking detailed notes is critical.
- Communicate feedback with carriers and maintain a good relationship with them to facilitate continued cooperation.
- Report and record all activity and correspondence with associates, clients and prospects through the CRM system for review by Director and leadership. Maintain client file management and records including updating records in CRM in a timely manner.
- Recognize areas of weakness, provide suggestions, and update documentation for process improvement.
- Perform general and administrative duties as assigned.

REQUIRED QUALIFICATIONS

<p>Knowledge</p> <ul style="list-style-type: none"> • Customer and Personal Service. Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction. • Clerical. Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, designing forms, and other office procedures and terminology. • Legal. Knowledge of health information privacy laws, the Employee Retirement Income Security Act (ERISA), the Consolidated Omnibus Budget Reconciliation Act (COBRA), and other applicable health laws. <p>Skills</p> <ul style="list-style-type: none"> • Active Listening. Giving full attention and respect to leadership, coworkers, and clients. Taking time to listen to what people are saying and understand the points being made. Provide empathy to client needs while asking questions when necessary. • Service Orientation. Actively looking for ways to help coworkers and clients. • Critical Thinking. Using logic and reasoning to identify the how best to solve or address questions, issues, and projects, and thinking ahead to determine potential issues or solutions. • Flexibility. Ability to adapt to new information and embrace changing conditions and unexpected obstacles. • Creativity and Innovation. Develops new insights, questions conventional approaches, and provides alternative solutions and approaches to problems. 	<p>Abilities</p> <ul style="list-style-type: none"> • Oral Expression. The ability to communicate information and ideas effectively in speaking so others will understand. • Judgment and Decision Making. The ability to use ethical principles and sound judgment when faced with making difficult decisions. • Problem Sensitivity. The ability to tell when something is wrong or is likely to go wrong by being proactive instead of reactive. • Written Expression. The ability to communicate information and ideas effectively in writing so others will understand. This also includes using proper grammar and spelling. • Prioritization. The ability to prioritize accounts and tasks to meet more important and time sensitive deadlines first. • Team Player. The ability to work cooperatively and effectively in a team environment to accomplish group goals. <p>Experience and Education:</p> <ul style="list-style-type: none"> • 3 years of job-related experience in the Healthcare/Benefits Industry required. • Experience using Microsoft Office 365; Outlook, OneDrive, SharePoint and Dynamics preferred. Must be proficient in Excel. • Insure Oklahoma knowledge a plus • Bachelor's degree preferred <p>Certifications/Licenses:</p> <ul style="list-style-type: none"> • Active Life, Accident, & Health Producer License required
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This position does not have the authority; neither express nor implied, to legally bind the Company to any contract without written, documented consent of an Officer of the Company.

SPECIAL JOB DIMENSIONS:

Position must be willing to travel on occasion for enrollment, education, and client service meetings as needed.

ATTENDANCE:

Employee must have the ability to comply with the company's attendance policy documented in the Employee Manual. This position is an 8:00am-5:00pm, Monday-Friday in-office position. Additional hours may be required during peak times.

PHYSICAL REQUIREMENTS AND WORK ENVIRONMENT

While performing the duties of this job, the employee is regularly required to sit for long periods of time and must have the dexterity of hands and fingers to operate a computer keyboard, mouse, and other office equipment. The employee must have visual acuity to read and draft reports, memos, letters, etc. Specific vision abilities required by this job include vision adequate for the incumbent to perform the responsibilities and functions of the job efficiently. Must be able to hear, speak and communicate clearly.

The employee will work in smoke-free office surrounding; noise level is quiet to moderate.

The qualifications, physical demands and work environment described herein are representative of those an employee will encounter and must meet to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The requirements listed in this document are the minimum levels of knowledge, skills and abilities.

This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.