



ACCOUNT MANAGER - POSITION DESCRIPTION

JOB SUMMARY/ORGANIZATIONAL IMPACT: The Account Manager (“AM”) in Emerging Markets provides support to the Senior Executive Vice President and producers of the Health & Welfare Division. The focus of this position is to ensure account management and outstanding customer service to the clients. They will direct the marketing/marketing renewal process and collaborate with producers to make decisions about client presentations. The AM is a subject matter expert and makes certain the clients’ needs are met in a timely manner and must be willing to assume the full responsibility of client retention. Finally, the AM is expected contribute to the growth of their assigned book of business.

RESPONSIBILITIES/ ESSENTIAL FUNCTIONS:

- Operate as the lead point of contact and relationship manager for an assigned book of business.
- Coordinate timelines and deadlines with producers, clients/prospects, benefits specialists and other team members for all presentations and plan updates.
- Collaborate with benefits specialists and producers to respond to RFP's, evaluate carrier proposals, and determine which options are most suitable for clients.
- Conduct enrollment and/or education meetings and plan reviews. Keep producers informed of any changes within client base such as personnel changes and new acquisitions.
- Proactively contact clients with courtesy communication to ensure plan is running smoothly and address any questions. Send out updates regarding industry, carrier, legislative, newsletters, and invitations to seminars.
- Coordinate with benefits specialists to prepare enrollment and plan communication materials, such as benefit guides, notices, etc., and collect and complete enrollment and plan change documentation based on client's renewal decisions and finalize a successful implementation process.
- Actively stay informed of insurance products, plans, representative and insurance regulations change through industry communications, meetings, webinars and continuing education.
- Develop and maintain strategic working relationships with carriers.
- Use CRM to manage client files and record all activity with clients and prospects for review by leadership.
- Perform related responsibilities and general administrative duties as required or assigned.
- Recognize areas of weakness, provide suggestions, and update documentation for process improvement.

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:</p> <ul style="list-style-type: none"> • 3 years of job-related experience in the Healthcare/Benefits Industry. • Experience using Microsoft Office 365; Outlook, OneDrive, SharePoint and Dynamics preferred <p>Education Required:</p> <ul style="list-style-type: none"> • Bachelor's degree preferred <p>Certifications/Licenses:</p> <ul style="list-style-type: none"> • Active Life, Accident, & Health Producer License • CEBS or equivalent preferred
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AUTHORITY

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.

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.