



POSITION DESCRIPTION

NAME		DEPARTMENT:	Group Benefits
TITLE	Assistant Account Manager	STATUS:	Full-time
REPORTS TO:	EVP, Group Benefits	CLASSIFICATION	Exempt

JOB SUMMARY/ORGANIZATIONAL IMPACT: The Assistant Account Manager is a strategic support position for Account Manager(s) and a secondary point of contact for clients. Assistant Account Managers must be highly responsive to client requests and be able to proactively identify client issues, as well as secure insurance company proposals.

RESPONSIBILITIES/ ESSENTIAL FUNCTIONS:

- Develop a professional supporting relationship with clients by maintaining a positive customer experience.
- Coordinate timelines and deadlines with producers, clients/prospects, and other team members for all presentations and plan updates.
- 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.
- Request, review for accuracy, evaluate and negotiate proposals from carriers to prepare Summit's presentation and recommendation based on the Account Manager's objectives.
- Coordinate with account managers and other team members 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.
- Utilize critical thinking and solid judgment to solve problems; make decisions and resolve complex issues as they pertain customer services, company policies and state and federal guidelines.
- Provide timely and thorough client communications, written and oral. Operate as an advocate for our clients, documenting the client's needs.
- Build and maintain positive client relationships through recurring calls, meetings and strategic partnerships with the customer and their advisors.
- Learn general working knowledge of carriers and other vendors, their products and services including basic contractual language and terminology.
- Record and manage records and communication in Summit's CRM (Client Relationship Management) system.
- Recognize areas of weakness, provide suggestions, and update documentation for process improvement.
- Perform general and administrative duties as assigned. Including assisting with client presentations, open enrollment meetings, benefit fairs.

REQUIRED QUALIFICATIONS

Knowledge

- **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.
- **Insurance.** Knowledge of the insurance industry as it relates to medical plans and third-party administrators.
- **Legal.** Knowledge of health information privacy laws (HIPAA and state laws), the Employee Retirement Income Security Act (ERISA), the Consolidated Omnibus Budget Reconciliation Act (COBRA), and other applicable health laws.
- **Third-Party Administration.** Knowledge of the third-party administration industry, namely medical plans, flexible spending accounts, and COBRA administration.

Skills

- **Active Listening.** Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- **Speaking.** Talking to others to convey information effectively.
- **Service Orientation.** Actively looking for ways to help people
- **Critical Thinking.** Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- **Social Perceptiveness.** Being aware of others' reactions and understanding why they react as they do.
- **Organization.** Balancing multiple tasks with different deadlines.
- **Technology.** Utilizing technological savviness to understand and figure out technological programs and processes.

Abilities

- **Oral Expression.** The ability to communicate information and ideas in speaking so others will understand.
- **Speech Clarity.** The ability to speak clearly so others can understand you.
- **Problem Sensitivity.** The ability to tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem.
- **Written Expression.** The ability to communicate information and ideas in writing so others will understand.
- **Judgment and Decision Making.** The ability to use ethical principles and sound judgment when faced with making difficult decisions.
- **Team Player.** The ability to work cooperatively and effectively in a team environment to accomplish group goals.
- **Flexibility.** Ability to adapt to new information and embrace changing conditions and unexpected obstacles.

Experience:

- 3-5 years previous work-related experience
- Experience using Microsoft Office Suite; Experience using Microsoft Office 365; Outlook, OneDrive, SharePoint, and Dynamics preferred.

Education Required:

- Bachelor's degree preferred.

Certifications/Licenses:

- Active State Life, Health, & Accident Insurance License preferred



AUTHORITY

This position does not have the authority; neither express nor implied, to legally bind the Company to any contract without 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.