POSITION DESCRIPTION

NAME:		**DEPARTMENT:**	Health and Welfare
TITLE:	Senior Benefits Account Manager	**STATUS:**	Full-time
REPORTS TO:	President, Benefits	**CLASSIFICATION:**	Exempt

JOB SUMMARY/ORGANIZATIONAL IMPACT: The Senior Benefits Account Manager ("SBAM") reports directly to the President, Benefits and provides support to Summit salespeople and independent producers. The primary focus of this position is to retain clients by providing outstanding account management and customer service to existing clients, and new clients after sales are closed. The SBAM will work directing with benefits marketing staff and oversee benefits implementation and renewal processes. The SBAM specializes in advanced subject matter expertise related to employee benefits, make certain the clients' needs are met, and must be willing to assume the full responsibility of client retention.

RESPONSIBILITIES/ ESSENTIAL FUNCTIONS:

- Operate as the lead point of contact and relationship manager for all matters specific to assigned clients, and provide support on prospects
- Coordinate timelines and deadlines with Producers, clients/ prospects, and marketing specialists for all presentations and plan updates.
- Collaborate with marketing specialists to develop the request for proposal, evaluate proposals, and determine what plan options to present to clients/ prospects
- Conduct enrollment and/ or education meetings and plan reviews. Inform producer of any changes within client base such as personnel changes and new acquisitions
- Contact clients proactively with courtesy calls/ emails to ensure plan is running smoothly and address any questions. Send out updates regarding industry, carrier, legislative, newsletters, and invitations to seminars
- Coordinate with Marketing Specialist to prepare enrollment and plan communication materials, such as benefit trifold, notices, benefit guide, etc., collect and complete enrollment and plan change documentation based on employer's renewal decisions, and finalize a successful implementation process
- Continuously stay abreast of insurance products, plans, representative and insurance regulations changes through industry communications, meetings, webinars and continuing education
- 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 President and leadership; maintain client file management and records including updating records in CRM in a timely manner
- Mentor and educate less experienced team member who shall be assigned.
- Perform related responsibilities and general administrative duties as required or assigned.

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.
- **Legal.** Knowledge of HIPAA and other health information privacy laws, the Employee Retirement Income Security Act (ERISA), the Consolidated Omnibus Budget Reconciliation Act (COBRA), and other applicable health laws.
- **Insurance.** Knowledge of the insurance industry as it relates to medical plans and third-party administrators.
- **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.
- **Persuasion**. Persuading others to change their minds or behavior.
- **Detail- Oriented:** Must have a strong attention to detail.

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.
- **Prioritization**: The ability to prioritize tasks and projects 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.

Experience:

- 4 years of relevant job-related experience; in-depth understanding of Microsoft Excel
- Experience using Microsoft Office 365; Outlook, OneDrive, and SharePoint preferred.
- Previous experience in insurance and healthcare industries preferred.

Education Required:

- Bachelor's degree preferred

Certifications/Licenses:

- Appropriate State Group Life, Accident, and Health License required.