

Benefits Account Manager

Job Description:

The account manager is responsible for assisting clients with service needs, making changes to existing accounts, and upholding the quality and service standards developed by the agency. The account manager will act as a liaison between the client and insurance company, recognizing the client's exposures and needs as directed by the group benefits advisor/producer. The account manager will assist the producer in handling, processing, and marketing of new and renewal group business. This position also includes the daily responsibility of managing the workload via the Epic software system. This position requires the ability to work in a fast paced, high volume workload environment. This position is an exempt position and reports to the Department Manager and/or the Office Manager.

Job Duties:

- Build and maintain relationships with clients, and carriers.
- Provide consistent, accurate, and timely communication to clients through, verbal and written correspondence.
- Conduct face to face meetings with the clients, and carriers as necessary. This would include conducting open enrollment meetings which may include travel.
- Re-market renewals, contact clients, create renewal proposals, prepare spreadsheets and plan options, and handle other renewal activities in coordination with the producer.
- Assist clients with service needs making changes to existing or new accounts, answering coverage questions and providing documentation of the changes to them.
- Resolve claims, billing administration, and others issues on a timely basis. Document accordingly through the agency system.
- Attend seminars and other training opportunities to maintain required licenses and for knowledge development.
- Work with other account managers as needed for customer support, sales presentations, and enrollment meetings.
- Provide technical support to Producers (coverage-wise, with proposal, suspense, items etc.) to help clients.
- Review sold group enrollment materials; send off to carriers and suspense for follow up, policy numbers etc.
- Renew policies by agency standards.
- Maintain client files accurately and consistently documenting conversations, sending confirmations to clients, adhering to all other automation procedures.
- Handle cancellations with care, saving all accounts possible, and notify producer(s) in a timely manner.
- Other duties as assigned that are relevant to the position.

Position Requirements:

- Minimum of 3 years' experience as a Benefits Account Manager.
- Must hold and maintain Life and Health license and comply with continuing education requirements.
- Knowledge of rating procedures, coverage, and industry operations to manage and maintain accounts.
- Strong written and verbal communication skills.
- Ability to organize, prioritize and self-manage work load.
- Computer literate with experience using Word and Excel.
- Ability to work in a team environment, with a positive attitude, and willingness to help others. Adaptable to new and changing circumstances, self motivated, and have a professional presence and demeanor.
- Able to work under pressure and time constraints.
- Must be able to perform in a fast paced, multi tasked, high disruption environment.
- Strong presentation skills.
- Lifting up to 10 pounds
- Good attendance.