

THE BENEFIT COMPANY

JOB DESCRIPTION – MAY 2017

Title

Account Manager

General Responsibility & Purpose

This position is responsible for the customer service and RFP/renewal support for the client in conjunction with the Account Executive and to support positive client relationships.

Qualities

- Ability to multi-task
- Ability to start and stop as needed
- Will be working directly with carriers/vendors, account executives, producers, clients and their employees
- Strong communication skills
- Strong organizational skills
- Ability to prioritize
- Attention to detail

Primary Functions

Tasks to be accomplished on a regular and routine basis by the Account Manager include the following. (Additional tasks may be requested.)

- Initiate and monitor the renewal process for assigned block of business.
 - Request census from client
 - Request renewal from current carrier(s)
 - Prepare RFP for ancillary lines of coverage
 - Monitor distribution and receipt of carrier responses
- Participate periodically in renewal/strategy meetings with AE and client
- Coordinate and finalize client facing renewal presentation
- Prepare open enrollment materials and assist with meetings when appropriate
 - Instruction/Enrollment Kits
 - Benefits at a Glance (BAAG)
- Manage implementation process and paperwork with client in conjunction with AE
 - New case paperwork
 - Cobra/HRA/HSA/FSA vendor information
- Prepare benchmarking information as needed/requested
- Prepare healthcare reform audit leveraging existing tools
- Employee advocacy issues (may ultimately be handled by a specific individual)
- Employee eligibility issues (may ultimately be handled by a specific individual)

- Update iDrive files/CRM system with new information
- Inform Kathy Reilly of changes with regard to commissions/carriers/product lines
- Manage client service issues
- Assist with gathering of Schedule A's and Form 5500 as needed