



POSITION: Account Manager for Group Clients
DEPARTMENT: Account Management
X Exempt Non-exempt

JOB RESPONSIBILITY SUMMARY:

The Account Manager is responsible for implementing new clients, assisting with client renewals and maintaining compliance with federal laws. The Account Manager must develop and maintain relationships with CEOs, CFOs, and HR representatives. Also responsible for providing excellent customer service to all clients and members.

ESSENTIAL FUNCTIONS:

- Manage implementation process with the customer and internal team members (eligibility, operations, claims, finance, etc.)
- Prepare internal and external documentation/communication materials for assigned customers.
- Work closely with the customer and broker to make sure eligibility, plans, banking, contracts and website are correctly set up.
- Maintain plan profile for all groups (new and existing)
- Maintain new customer implementation and termination checklists
- Review Summary Plan Description for customers.
- Train new customers on website functionality
- Stay abreast of industry and government changes affecting group insurance and maintain an awareness of existing and developing rules and regulations.
- Maintain knowledge of Prescription plans.
- Prepare and approve all PBM plan design changes
- Communicate plan design changes and implementations internally and support operations on customer questions
- Maintain Customer Database
- Maintain relationship with external vendors
- Meet customer retention goals

Essential Skills and Experience

- Knowledge, experience and understanding of group insurance
- Strong written and verbal communication skills
- Interpersonal skills – broker and customer relationships
- Ability to handle difficult situations
- Advanced problem solving skills including ability to review at detailed level
- Decision making skills
- Advanced organizational skills
- Strong customer focus and sense of urgency
- Ability to manage multiple assignments simultaneously and completing accurately and timely; strong attention to detail
- Understanding of stop loss insurance and reporting / filing process
- Understanding of the significance of the customer relationship and having a desire to constantly enhance that relationship
- Ability to prioritize work

Qualified candidates should send a resume and salary expectations to:
careers@customdesignbenefits.com.