



Custom Design Benefits

Department: Account Management	Job Title: Account Manager for Group Clients	Reports to: VP, Business Development & Compliance
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Type of position: <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time	Minimum Hours: 40 <input checked="" type="checkbox"/> *Exempt <input type="checkbox"/> Nonexempt *Supervises others <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
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Job Summary: *The following statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.*

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:

- Responsible for working with the Sales team to onboard and integrate new clients to achieve a successful implementation as measured by the new client survey. Help customers through email, phone, online presentations, screen-share and in person meetings
- Develop a trusted advisor relationship with key accounts, customer stakeholders and executives
- Ensure the timely and successful delivery of our solutions according to customer needs and objectives
- Prepare internal and external documentation/communication materials for assigned customers.
- Manage implementation process with the customer & internal team members (eligibility, operations, claims, finance, etc.)
- Responsible for keeping current clients satisfied and delivering exceptional client service on a day-to-day basis to achieve a 95% Excellent Rating
- Prepare internal and external documentation/communication materials for assigned customers.
- Work closely with the customer & broker to make sure eligibility, plans, banking, contracts & website are correctly set up.
- Maintain plan profile for all groups (new and existing)
- Maintain new customer implementation & termination checklists
- Review Summary Plan Description for customers.
- Train new customers on website functionality
- Stay abreast of industry & government changes affecting group insurance & maintain an awareness of existing & developing rules & regulations.
- Maintain knowledge of Prescription plans.
- Prepare & approve all PBM plan design changes
- Communicate plan design changes & implementations internally & support operations on customer questions
- Prepare and present client reporting to help drive benefit decisions to achieve client's goals
- Train clients on technology functionality and monitor and analyze client's usage of these programs.
- Update job knowledge by participating in educational opportunities; reading professional publications; maintaining personal networks; participating in professional organizations
- Forecast and track key account metrics according to team performance objectives
- Communicate clearly the progress of monthly/quarterly initiatives to internal and external stakeholders
- Stay abreast of industry & government changes affecting group insurance & maintain an awareness of existing & developing rules & regulations.
- Responsible for keeping current clients satisfied and delivering exceptional client service on a day-to-day basis
- Maintain Salesforce information for sales opportunities and client information.
- Maintain relationship with external vendors including reporting vendors
- Create and maintain medical and pharmacy data reporting using reporting technology
- Other duties as assigned.

Essential Skills and Experience:

- Proven account management or other relevant experience
- Demonstrated ability to communicate, present and influence credibly and effectively at all levels of the organization, including executive and C-level
- Experience in delivering client-focused solutions based on customer needs
- Proven ability to manage multiple projects at a time while paying strict attention to detail
- Excellent listening, negotiation and presentation skills
- Excellent verbal and written communications skills
- Knowledge, experience & understanding of group insurance
- Self-motivated and able to thrive in a results-driven environment
- Natural relationship builder with integrity, reliability and maturity
- Ability to prioritize among competing tasks
- Critical thinking and problem-solving skills
- Advanced organizational skills
- Understanding of stop loss insurance & reporting / filing process
- Understanding of the significance of the customer relationship & having a desire to constantly enhance that relationship

Fundamentals: 1. Take Care of Our Clients; 2. Deliver Results; 3. Get the Facts; 4. Be a Fanatic About Response Time; 5. Own It; 6. Be a Life Long Learner; 7. Honor Commitments; 8. Get Clear on Expectations

StrengthsFinder: Achiever-E, Analytical-S, Command-I, Communication-I, Learner-S, Responsibility-E, Positivity-R, Restorative-E, Self-Assurance-I, Strategic-S

Degree of Supervision: *Close Supervision (Entry Level), Supervision (Independent), General Supervision (Advanced), Direction (Manager), General Direction (Director)*

- Advanced

Physical Demands and Work Environment: *The physical demands and work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

- **Physical Demands:** Job requires sitting up to eight hours a day. Body movement primarily in hand and arm functions associated with normal office activities. Hand and eye coordination, and hand dexterity is required for handwriting and keyboarding over prolonged periods of time. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus. This position requires occasional lifting and/or carrying of no more than 25 pounds, and bending, squatting pushing and pulling.
- **Work Environment:** The noise level in the work environment is usually minimal.