



**Position Title:** Account Manager  
**Department:** Client Services  
**Reports to:** Operations Manager

### **Objectives**

The Account Manager works closely with their accounts, brokers, carriers and our Client Services Team. This position is responsible for servicing of clients in a manner that promotes account retention. Responsibilities include ability to effectively develop an implementation strategy and enrollment timeline, develop enrollment communication material to include an enrollment guide, product knowledge and serving as a liaison between the client and the carrier's to resolve billing, administrative, and claim issues. Mentor and train their Assistant Acct Manager, with a focus of preparing them for advancement, to the Acct Mgr role. Accurate and timely processing of business is essential.

### **Major Responsibilities**

- Implementation of new/renewal enrollments
- Develop and prepare enrollment and employee education materials
- Assist with enrollment meetings as needed
- Educate group administrators and employees as needed on Benefitfirst
- Assist clients with service issues, including member claim issues, billing issues, product and Benefitfirst questions
- Maintain current account information in electronic format on our system
- Maintain a working knowledge of products and carrier's strengths
- Maintain accurate and complete documentation of all processed transactions
- Maintain internal and external confidentiality of sensitive agency, client, employee and enrollee information
- Maintain and promote compliance with agency policies and procedures.
- Recognize and meet critical deadlines
- Mentor and train their assistant account manager in a way that positions them for future advancement
- Perform other duties as assigned

### **Skills**

- Ability to meet crucial deadlines
- Working knowledge of Word, Excel and PowerPoint
- Ability to prioritize and work effectively on multiple tasks in a fast paced environment
- Ability to consistently process increasing volumes of accurate transactions
- Well organized, self-motivated and able to work independently. Must also be able to interact effectively with others at all levels both within and outside the agency
- High ethical standards and the desire to maintain agency confidentiality
- Strong, cross-functional team player that works within, and in support of, a team environment where exceeding client expectations is a priority
- Demonstrated automation and computer skills in a networked Windows environment

**Working Conditions and Physical Requirements**

- Normal office environment
- Prolonged computer work daily
- Some lifting may be required to move equipment, files and supplies

**Education and Experience**

- High school diploma or equivalent work experience in human resources, insurance or financial services
- SC L&H License