



Position Description

Title: Small Group Account Manager

Reports to: Account Management Practice Leader

Purpose of position:

Provide day-to-day support to an assigned book of small group clients individually (client size primarily less than 50 lives). Responsible for implementation of each client's annual strategic plan.

Relationships:

Clients, Carrier/Vendor Partners, Employees

Essential Duties and Responsibilities:

1. Maintain regular email and telephone correspondence with face to face client interaction as needed on a variety of benefits topics.
2. Troubleshoot any client issues; respond to client requests within 24-36 hours of receipt. Resolve issues and communicate accordingly.
3. Negotiate and present client renewals on an annual basis.
4. Responsible to keep up with all legislative issues related to employee benefits. Stay current on legislative issues and present them to the client as they impact client benefit plans.
5. Work with clients to determine content for client communication materials.
6. Market client plans as necessary and present marketing analysis.
7. Handle various administrative tasks associated with client service.
8. Prepare annual benchmark reports as needed.
9. Follow up with Producer regarding account status/changes on a regular basis.
10. Develop strong relationships with carrier/vendor partners.
11. Conduct open enrollment meetings/presentations for clients as needed.
12. Regularly enter pertinent client information into the Agency Management System.

Position Requirements (knowledge, skills and abilities required to perform satisfactorily in the position):

- A bachelor's degree from an accredited university or a high school diploma and at least one to two years of progressive experience in the field of account management.
- At least two years of progressive experience with employee benefits preferred.
- A current benefits license for the state of Georgia or the ability to obtain one within 60 days of hire.
- Strong attention to detail and follow through required.
- Stellar presentation skills to audiences of all sizes required.
- Must possess excellent listening, written and verbal communication skills.
- Superior client service skills.
- Familiarity and practical knowledge of small group quoting process and tools; preferred.
- Expert knowledge of Microsoft Office including Word and Excel.
- Strong organizational skills.
- Ability to multi-task and handle multiple projects with deadlines at the same time.
- Ability to work quickly and accurately.
- Ability to work as a team member, externally and internally.
- Ability to be flexible based on internal and external needs.
- Ability to work under pressure and multiple deadlines.

Physical Demands:

- Position requires sitting at a desk working on a computer for at least 2/3 of time.
- Position requires minimal lifting up to 25 lbs.
- Position requires regular and reliable attendance.
- Position requires proficiency in English and grammar usage skills.
- Position requires local travel.

By my signature below, I acknowledge that I understand the accountabilities of the role and that my performance will be evaluated based on my success in achieving the goals set out in the position. I also acknowledge that my job description may change due to changing company needs or environment and that my accountabilities may be changed or added to during the course of my employment.

Employee Name

Date