



Position Description

Title: Employee Benefits Coordinator

Reports To: Practice Leader, Account Management

Purpose of position:

Provide day-to-day support for the Account Management team. Work with team members on a variety of projects to ensure client's needs and objectives are met.

Relationships:

Clients, Carrier/Vendor Partners, Employees

Essential Duties and Responsibilities:

1. Handle various administrative tasks associated with client service. Administrative tasks may include spreadsheet and document preparation, contacting vendors to obtain status reports on pending items, auditing reports and assisting Account Executives with client projects.
2. Troubleshoot any client issues; respond to requests within 24 hours of receipt. Resolve issues and communicate accordingly. Examples could include research, billing issues and audits and other administrative client needs.
3. Assist Account Executives with preparation of client communication campaign materials including editing and proofreading benefits brochures.
4. Assist Account Executives with contract reviews, benefit administration testing, federal notices and 5500 preparation.
5. Serve as a client contact point when the Account Executive is out of the office.
6. Market client plans as necessary, follow up on outstanding proposals and prepare preliminary marketing analysis spreadsheets.
7. Assist with preparation of stewardship and financial reports for clients on an annual basis or as needed.
8. Assist with preparation of benchmark reports, open enrollment presentations, Brainshark presentations and Jellyvision tool.
9. Follow up with Account Executives regarding account status/changes on a regular basis.
10. Develop relationships with carrier/vendor partners.

11. Assist with set up and maintenance of client Benefit Administration systems.
12. Capture pertinent client information in 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 high school diploma and four years of experience working in a professional environment.
- Prefer at least one year of work experience.
- Obtain a benefits insurance license for the state of Georgia within 60 days of hire.
- Strong attention to detail and follow through required.
- Must possess excellent listening skills.
- Superior client service skills.
- 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 an internal team member.
- Ability to be flexible based on internal and external needs.
- Ability to work under pressure and multiple deadlines.
- This position is not eligible for limited telecommuting.

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.

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