



Position Description

Title:	Team Leader, Employee Benefits Consultant
Reports to:	President

Purpose of position:

Act as lead on a book of accounts, providing expert employee benefits advice and day-to-day support to the assigned group of clients. Responsible for successful implementation of each client's annual strategic plan, including marketing and negotiating compliant health and welfare plans. Build strong relationships with clients.

Provide player-coach leadership to a team of Consultants and Specialists, requiring a deep understanding of medical and ancillary products including but not limited to: fully insured and self-funded plans, pharmacy carve-outs, compliance requirements, open enrollment design and data analytics. Communicate regularly with direct reports, both individually and as a group, to mentor and support client activity and teambuilding.

Relationships:

Clients, Carrier/Vendor Partners, Internal Employees

Essential Duties and Responsibilities:

1. Act as lead Consultant for an assigned book of business. Regularly communicate with clients on a variety of benefits issues and projects relating to the annual strategic plan. Meet with clients at least quarterly in a face-to-face setting to build and maintain strong relationships.
2. Troubleshoot any client issues; respond to client requests within 24 hours of receipt. Resolve issues and communicate accordingly. Proactively provide updates to clients throughout the plan year.
3. Negotiate and present client renewals on an annual basis.
4. Market client plans as necessary and present marketing analysis to the client.
5. Stay current with legislative and compliance information related to employee benefits. Present pertinent information to clients and explain the impact on client benefit plans.
6. Work with clients to determine content for client communication campaign materials. Work with Creative Services to produce communication materials, owning the content of each piece.
7. Lead an Employee Benefits Consulting team including but not limited to: recruiting new employees, running regular team meetings, conducting regular one-on-ones with direct

reports, managing performance and recognizing excellence. Support team in goal development and career progression.

8. Provide counsel to team on complex account issues, including self-funded accounts, level-funded accounts and fully insured accounts.
9. Analyze client data and report on trends and recommendations via presentations, dashboards, etc.
10. Prepare stewardship and financial reports for clients on an annual basis or as needed.
11. Follow up with Producers regarding account status/changes on a regular basis.
12. Develop strong relationships with carrier/vendor partners.
13. Conduct open enrollment meetings/presentations for clients in person and/or virtually.
14. Participate in presentations for prospective clients; lead the discussion of Employee Benefits Consultant roles and responsibilities.

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

- A bachelor's degree from an accredited university.
- At least five years of progressive experience with health and welfare plans required. Prefer at least 7 years of experience.
- Experience managing fully insured, level funded, and especially self-funded groups required. Prefer candidates who have directly managed groups with at least 500 employees.
- Ability to effectively share knowledge and invest time in direct reports to help them develop required.
- Ability to innovate, understanding the service model provided to clients and suggest improvements or enhancements to the client offering.
- Ability to manage client expectations and needs of direct reports successfully required.
- A current life and health insurance license for the state of Georgia or the ability to obtain one within 60 days of hire.
- CEBS, ChFC, CLU or FMLA or progress toward designations preferred.
- Strong attention to detail and follow through required.
- Stellar presentation skills to audiences of all sizes required. Ability to effectively present information in person and/or via webinar or video conference required.
- Must possess excellent listening skills.
- Superior client service skills.
- Expert knowledge of Microsoft Office including Word, Excel and Powerpoint. Adobe Suite experience preferred.
- Strong organizational skills.
- Ability to multi-task and handle multiple projects with deadlines at the same time.
- Ability to work quickly and accurately.
- Effective leadership or management of direct reports in previous roles strongly preferred.
- 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 and overnight travel (up to 30 to 40% of time).

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