



<b>Job title</b>	<i>Account Executive</i>
<b>Classification</b>	<i>Salary</i>
<b>Reports to</b>	<i>Director of Operations</i>

### **Job Description**

The Account Executive manages the ongoing service relationship of assigned clients in relation to their employee benefit plans, including but not limited to medical, dental, vision, life, disability and worksite products and is responsible for the administrative service of clients, specific to assigned market segment through timely, thorough and tactical support.

### **Essential Duties / Functions**

- Interacts with Advisors and clients to implement benefit plan decisions – renewing, updating, changing and or revising plans as per client directions; notifying carriers of decisions and confirming final rates.
- Review necessary client materials for renewal and or enrollment activities.
- Schedule and facilitate client meetings via phone and or webinar.
- Procure all required agreements from clients.
- Manage service issues.
- Prepares carrier documentation and other end of enrollment items for distribution to client.
- Proactively interacts / touches base with assigned client via phone and / or email at least once per quarter.
- Assist with client's employee enrollment and claim issues, as needed.
- Assists clients with general mid-year questions and concerns regarding employee benefit plans and policies.
- Develop client communication content regarding annual renewal changes, enrollment procedures, miscellaneous benefit changes and or clarifications.
- Educate employers on enrollment requirements and process, as client has elected.
- Communicate regulatory due dates, timelines and expectations to clients.
- Provide timely responses to employer surrounding appropriate expected timeframe for services and or necessary next steps to resolve any outstanding issues
- Develop and maintain excellent carrier relationships.
- Other duties as assigned.

### **Competencies**

- **Job Knowledge** – demonstration of job skills and knowledge required to perform the position.
- **Quality of Work (Standards)** – accuracy and thoroughness of assignments; pays close attention to detail; shows concern for all aspects of the job and follows up on work outputs.
- **Quantity of Work** – ability to meet productivity and timeliness.

- **Cooperation / Teamwork** – interacts with people effectively; able and willing to share and receive information; co-operates within the group and across groups; supports group decisions and puts group goals ahead of own goals.
- **Reliability** – takes personal responsibility for job performance; completes work in a timely and consistent manner; sticks to commitments.
- **Integrity** – shares complete and accurate information; maintains confidentiality and meets own commitments; adheres to organizational policies and procedures.
- **Adaptability** – adapts to changing work environments, work priorities and organizational needs; able to effectively deal with change and diverse people.
- **Motivation** – displays energy and enthusiasm in approaching the job; commits to putting in additional effort; maintains high level of productivity and self-direction.
- **Stress Tolerance / composure** – displays emotional resilience and the ability to withstand pressure on an on-going basis; deals with difficult situations while maintaining performance and self-control; seeks support from others when necessary and uses appropriate coping techniques.
- **Communication** – expresses ideas effectively; organizes and delivers information appropriately; listens actively.
- **Judgement / decision making** – uses sound judgement to make good decisions based on information gathered and analyzed; considers all pertinent facts and alternatives before deciding on the most appropriate action; commits to decision.
- **Planning & Organizing** – plans and organizes tasks and work responsibilities to achieve objectives; sets priorities; schedules activities; allocates and uses resources properly.

### Qualifications

- 2-4 year college degree in business related major OR 10+ years experience in employee benefit plans
- 5+ years of Customer Service experience.
- Health License (active).
- Account Manager Certification.
- Specialty Certifications (NAHU).
- Excellent interpersonal skills, with an ability to partner with a dynamic team.
- Flexible and able to multitask; can work within an ambiguous, fast-moving environment, while also driving toward clarity and solutions; grace under pressure.
- Direct experience working for insurance brokerage / agency firm or carrier or Human Resources w/ experience working with Benefit Administration.
- Health & Life license required within 1 year.

### Work Environment & Physical Demands

This job operates in a professional work environment with prolonged periods of sitting at a desk, talking on a phone and working on a computer.

### Position type and Expected Hours of Work

This is a full-time position with typical business days and hours of work being Monday through Friday, 8:00 a.m. to 4:30 p.m., recognizing there may be times for additional hours based on peak volume.

### Travel

Willingness to travel on occasional basis.

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<b>Approved by:</b>	
<b>Date approved:</b>	
<b>Reviewed*:</b>	

*\*Per company policy, job descriptions will be reviewed annually and updated as often as necessary.*