



Job title	<i>Account Coordinator</i>
Classification	<i>Salary</i>
Reports to	<i>Account Implementation and Renewal Team Lead</i>

Summary

The Account Coordinator, partnering with both Advisors and Account Managers, manages the procurement process of obtaining quotes for prospective clients, set up of new group and or individual plans and policies and maintaining the onboarding of newly established clients, in relation to their employee benefit plans, including but not limited to medical, dental, vision, life, disability and worksite products. Additionally, the Account Coordinator will ensure the issuance and set up of new clients is compliant, accurate and carried out in a timely manner, according to agency service standards.

Essential Duties / Functions

- Build effective relationships with Advisors acting as a consistent point of contact throughout the client acquisition process and responding to clarifying inquiries surrounding quoting, eligibility, and other requirements.
- Shop and quote for all existing agency and all new group prospects for the agency, as requested, including but not limited to ACA quotes, Medicare Supplement and Part D sales.
- Work with Advisor to obtain all necessary client information to prepare signature ready documents, including carrier applications and enrollment requirements, necessary for client review and acceptance.
- Ensures all completed employer applications are received by the Advisors, accurately and submitted to the carriers in a timely fashion.
- Assist Advisors and Account Managers in the preparation of client meetings, which may include client presentations and proposals, as well as employee enrollment materials for new or existing clients.
- Set up of product data online for newly sold group / individual benefits.
- Maintain client database, includes careful and consistent data entry, data posting to the web, and client set up and upkeep.
- Keep current with carrier products and quoting requirements.
- Other duties as assigned in overall support of agency:

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.

Qualifications

- High school diploma (or equivalent), 2 year college degree in business related major OR 1-2 years of experience in industry.
- 1-2 years of Customer Service experience.
- Ability to manage priorities and workflow with versatility, flexibility, and a willingness to work within consistently changing priorities with enthusiasm.
- Excellent interpersonal skills, with an ability to partner with a dynamic team.
- Possesses personal qualities of integrity, credibility, and commitment.
- Flexible and able to multitask; can work within an ambiguous, fast-moving environment, while also driving toward clarity and solutions; grace under pressure.
- Working knowledge of carrier benefits information and where to obtain information.
- Working knowledge of benefit enrollment technology solutions.
- Acute attention to detail.
- Excellent customer service skills.

Work Environment & Physical Demands

This job operates in a professional work environment with prolonged periods of sitting at a desk and working on a computer. This role routinely uses standard office equipment such as phones, computers, photocopiers, filing cabinets and fax machines.

Position type and Expected Hours of Work

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

Travel

Willingness to travel on occasional basis.

Approved by:	
Date approved:	
Reviewed*:	

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