

## EMPLOYEE BENEFITS - CLIENT ANALYST JOB DESCRIPTION

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The Client Analyst supports the Account Management team in a collaborative effort to execute the annual marketing process, recurrent financial and clinical reporting and the development and delivery of the annual stewardship report. The financial projects may include; monthly claims report, contribution modeling and other financial reports based on client needs. The Client Analyst must be action oriented, client service focused, collaborative, self-aware and committed to self-development. Client Analysts are expected to communicate effectively, optimize work processes and make high quality decisions to ensure a strong working relationship with the Account Management team, and quality execution for the client.

### REPORTS TO

Practice Leader

### MARKETING PROJECTS

- Collaborate with team to develop pre-renewal and renewal strategy.
- Gather and organize marketing information (census, plan designs, prior 2 years carrier rates, renewals, claim experience and commission information) and prepare the request for proposal to execute.
- Must follow peer review process for all proposals to ensure accuracy with rates, plan design, contract nuances and commissions. Ensure all relative material are in the shared drive for team to access.

### FINANCIAL PROJECTS

Complete client financial projects, including: contribution modeling, monthly claims summaries, Plan Performance Reviews, stop loss level analysis, accrual rates/fully-insured equivalents, COBRA rates, IBNR calculations, plan design decrement calculation, carrier network disruption analysis, network discounts analysis and other financial reports as needed.

### REQUIREMENTS

- BA in Business, Finance or related field (or relevant work experience)
- Proven analytical skills and knowledge of computing
- Advanced Excel proficiency
- Attention to detail and ability to make quality decisions in a fast pace environment
- Good communication and presentation skills

### SUPERVISORY RESPONSIBILITY

None



**WORK ENVIRONMENT**

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, cell phones, photocopiers, filing cabinets and fax machines.

**PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is occasionally required to stand; walk; sit; use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms; climb stairs; balance; stoop, kneel, crouch or crawl; talk or hear; and taste or smell. The employee must occasionally lift or move up to 25 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception and the ability to adjust focus.

**POSITION TYPE/EXPECTED HOURS OF WORK**

Full Time Position – 40-hour work week

