# EMPLOYEE BENEFITS - CLIENT EXECUTIVE

## JOB DESCRIPTION

The Client Executive is responsible for leading the development, quality and execution of the client consulting relationship. The Client Executive must possess a strategic mindset and a commitment to being action-oriented, client service focused and collaborative. These experienced professionals should possess a working knowledge of benefits and demonstrated expertise in delivering consulting services to organizations. Client Executives are expected to communicate effectively, make high-quality decisions and maintain self-awareness to instill trust with the client, internal team members and strategic partners. They should have a desire to mentor/develop more junior staff.

**REPORTS TO**

Practice Leader

**KEY RESPONSIBILITIES**

- Keep work plan on track and directing updates as needed throughout year.
- Manage and coordinate the completion of all client meeting deliverables, including meetings notes, action item deliverables, follow-up meetings, etc.
- Draft and send meeting notes following all external client meetings.
- Actively manage all client relationships, including but not limited to carrier service, social events and personal relationship development opportunities with client.
- Ensure client satisfaction with The Fedeli Group's consulting and service performance.
- Deliver plan performance review (clinical and financial reporting) throughout the year for each client.
- Deliver comprehensive stewardship report annually.
- Coordinate stewardship discovery and planning session with Client Manager, Client Analyst, analytics team and wellness team.
- Manage renewal planning to ensure client timeframes are met.
- Collaborate with client to determine and recommend appropriate renewal strategy, including any marketing efforts.
- Negotiate renewal and proposal parameters with carriers.
- Develop and deliver final renewal recommendation to client. Draft renewal executive summary to accompany renewal recommendation.
- Prepare and deliver annual compliance review for all assigned clients.
- Actively participate in the development and advancement of client deliverables, strategic initiatives and thought leadership for the assigned business segment and Benefits Department.
- Support business development and RFP response efforts, as needed.

**REQUIREMENTS**

- Minimum 5 years relevant industry experience
- State Life and Health license
- Pursuit of CEBS designation, or health and welfare actuarial / underwriting training desired
- Working knowledge of Excel, MS Word
- Availability to travel on an as needed basis
- BA/BS degree, preferred but not required
- Proven experience in fast-paced environments
- Exceptional verbal and written communication skills
- Adaptability and strong problem-solving skills
- Ability to manage complex accounts and group structures
- Ability to build rapport and collaborate with other within the company and externally
- Understanding of client behaviors and industry trends

**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