

EMPLOYEE BENEFITS - CLIENT MANAGER JOB DESCRIPTION

The Client Manager is responsible for the day-to-day client management and the successful execution of the client service relationship in order to resolve current needs as well as institute new processes to provide long-term strategic solutions. The Client Manager must be action oriented, client service-focused, collaborative, self-aware and committed to self-development. Client Managers are expected to communicate effectively, optimize work processes and make high-quality decisions to ensure a strong working relationship with the client, internal team members, and strategic partners. The Client Manager is a team player who takes initiative, is resourceful and is self-motivated to continuous learning and development

REPORTS TO

Practice Leader

KEY RESPONSIBILITIES

- Facilitate client implementation timelines and execution from inception through delivery.
- Work with carriers on all implementation tasks, including implementation meetings and deliverables (census elections, carrier termination letters, signature documents and associated implementation deliverables).
- Review key implementation documents for accuracy and client intent.
- Present, coordinate and review open enrollment material for accuracy and client intent.
- Support client executive and team in maintaining client relationships.
- Provide guidance, problem solving and day-to day service management to ensure a successful client experience.
- Manage escalated service billing, claims and other service issues.
- Complete Renewal Summary at renewal.
- Coordinate renewal planning with Client Executive to ensure client timeframes are met.
- Participate in renewal strategy and recommendation meetings.
- Coordinate and execute new and existing client onboarding process.
- Attend compliance audit meetings with Client Executive.
- Ensure internal compliance is met and general document management is maintained.

REQUIREMENTS

- Minimum 3 years relevant industry experience
- Life and health license or willingness to pursue
- Proven experience in fast-paced environments

- Exceptional verbal and written communication skills
- Well organized and detail oriented
- 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
- Ability to ask the right questions and seek help where appropriate
- Strong computer skills including Microsoft Office (Word, Excel and PowerPoint), and ability to learn new technologies and recommend new technology solutions

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

