

Benefits Account Manager

Department: Producer Unit

FLSA: Exempt

Reports to: Producer

Issue Date: 12/2011

POSITION SUMMARY

Demonstrate an effective and efficient use of the department workflow procedures by properly conducting the sale and installation of all benefits products. Possess the expertise to assist the Producer in achieving the level of service required by his/her clients. Assist in the sales process as needed.

JOB DUTIES/ESSENTIAL FUNCTIONS

- Develop strategic and client specific service action plans and successfully execute the tactics/strategies.
- Successfully install new and renewed business to include the installation of case with chosen carrier, record build out, data maintenance on agency systems, coordinating employee meetings, reviewing compliance issues, initiating and executing planning discussions, documenting files, and logging activities.
- Re-market existing accounts on existing lines of coverage and market for new lines and opportunities.
- Produce and collate accurate and timely spreadsheets and proposals.
- Assist Producer with on-site meetings when requested.
- Resolve claims, billing, administration, and other issues on a timely basis. Document accordingly within agency systems.
- Keep clients abreast of legislative, products, services, and market changes through the successful usage of Crane's Zywave tools, as well as verbal and written communications.
- Maintain knowledge of Crane's Zywave suite of product including Mywave Portal, HR Connection, and Plan Analysis. Be able to demo, interpret, install, use, and service these products.
- Stay current in small and large case products, services, legislative changes, administration, competition, laws, ERISA/DOL/IRS/Insurance regulations, HR issues, and worksite benefits.
- Act as a trusted advisor to the Producer and their clients.
- Act as the individual health/dental/Medicare supplement & Medicare Part D sales support person.
- Attend requested meetings and training sessions sponsored by insurance carriers.
- Prompt and reliable attendance required.
- Performs other duties as assigned.

NONESSENTIAL FUNCTIONS

- General filing, which may require reaching and lifting.
- Required to sit for long periods of time.
- Infrequent light physical effort required.

POSITION REQUIREMENTS

Education/Experience A college degree or equivalent in a related field; must have prior experience with an insurance brokerage agency or a benefits carrier.

Licensure/Certification: Must have current Life and Health License held in Missouri and Illinois.

Personal Characteristics: Candidate must be outgoing and friendly as position requires meeting many different types of people. Must be adaptable to a fast paced environment. Candidate must be detail oriented and have excellent follow up skills. Candidate must organized and able to multi task. Candidate must produce accurate work in a timely fashion.

I have read and understand the Benefits Account Manager job description and can perform the essential functions with or without reasonable accommodation. Nothing in this job description restricts management's right to assign or reassign duties and responsibilities at any time. This job description reflects management's assignment of essential functions but does not prescribe or restrict the tasks that may be assigned.

Further, I understand that this job description in no way constitutes a contract of employment or restricts the rights of the Charles. L. Crane Agency Company as an "at-will" employer under Missouri law.

Signature of Employee

Signature of Supervisor

Date

Date