Job Description: Account Manager

Office Location:	Position Reports to:	Approval Date:
Newark, DE	Operations Leader	

Job Responsibilities

Act as expert employer resource and aid in supporting all efforts of the sales team:

- Assist with annual benefit renewal activities including pricing of benefit programs, analysis of options, and illustration of proposed benefit plans.
- Assist with specific benefit related tasks and projects, including but not limited to, renewal documentation, file updates, compliance related items, and meeting preparation.
- Liaison with benefit carriers and vendors on issue resolution and monitoring benefits service levels for clients.
- Participate in year-end benefit planning activities, including developing project plans and various documentation and communication activities.
- Organize, implement and present at benefit seminars and group meetings.
- Maintain positive relationships assisting internal and external clients with requests and problems and respond promptly.
- Various large and small-scale projects.
- Strategize with employers on sales situations and complex claim problems and act as a liaison for coordination of all service, claims, and quoting issues as needed.
- Mentor teammates and help coordinate training as appropriate; serve as a resource to the Operations Leader & Account Management Team, also facilitate the learning curve for newer members of the team.
- Service existing accounts and help renew cases strategically – Ensure key corporate objectives are met by minimizing lateral movement (renewing with incumbent carrier whenever possible) and completing the coverage package at every renewal (that includes requesting, presenting and recommending ancillary coverage for all existing clients where our broker/we don't currently represent that/those line(s) of coverage. A strong knowledge of all carrier, medical and ancillary products is critical.
- HRA/HSA proposals and spreadsheets, follow up closely and present them to employers as necessary.

Handle/delegate employer inquiries regarding processes/forms/procedures, such as:

- Submission deadlines
- Completing apps/forms
- Underwriting guidelines/acceptable tax documentation
- Knowledge of product availability by carrier
- Knowledge of plans/benefits

- Other assignments or responsibilities as may be necessary.

Key Objectives

Seeking the right individual to complement our growing Sales/Account Management Team. The successful candidate must have experience with modeling financial risk, comparing costs and identifying the pros and cons of various healthcare and funding options. This position requires a high degree of accuracy and the ability to multi-task and meet frequent deadlines. Ideally, this position is best suited for someone who is seeking an analytical employee benefits position within the insurance and risk management field. Day to day tasks include supporting the employee benefit plans and programs of Ascela clients and co-brokers. Client relationships are of the utmost importance. The candidate must excel in product knowledge and problem solving and exhibit an ability to manage multiple priorities simultaneously. This candidate will be the face of Ascela when employers call this team; the candidate's expertise must further be applied on new case processing and for strategically renewing cases with a minimization of lateral movement and a focus on ancillary sales.

Key Result Areas

- Retention of assigned case load.
- Attention to detail & error-free work products.
- Positive client and vendor relationships.
- Upsell new products to existing client base.

Characteristics

- Task oriented.
- Organized.
- Team player.
- Efficient.
- Personable.

Position Qualifications/Skills

- Bachelor's degree in business, HR, or benefits administration or equivalent work experience.
- Excellent interpersonal, verbal and written communication skills.
- Self-motivated.
- Detail oriented.
- Ability to balance competing priorities.
- Proficient in MS Office.
- Proficient math skills.
- Expert knowledge of Excel – advanced skills required.
- Strong and demonstrated analytical skills; ability to summarize results of analysis of data, identify trends and issues.
- Applicant must sign an Employee Confidentiality, Non-Competition and Non-Solicitation Agreement.
- Applicant must provide an application for Employment.
- 4+ years' insurance and account management experience.
- Required to hold an active Health and Life License in Pa, NJ or DE.
- Computer proficiency required.

Candidate Development

- Performance reviews will be performed annually.
- Opportunities for advancement will be based upon merit and exemplary results against business objectives.