EMPLOYEE
BENEFIT
SERVICES

Large Group Client Manager

Department: Customer Service
Classification: Full-Time (40 hours/week), Salaried, Exempt

POSITION SUMMARY

The Client Manager partners with the Benefit Consultant and our clients to assist them with their annual renewal process, cross-sell opportunities and possible options that would enhance or meet the goals of the client. The end product of this partnership is intended to add value to the client, enabling the client to be competitive in their own industry. Client Managers must contribute to and flourish in a team environment, learn and exemplify the Collaborative Way, and engage in regular professional development.

POSITION RESPONSIBILITIES

Account Management:

1. Partners with the Consultant on their book of business and works closely to ensure a smooth renewal process.
2. Responsible for the renewal, implementation, and enrollment process as directed by the Consultant.
3. Communicates thoroughly and clearly with all team members concerning client issues, renewals, and proactive work.
4. Assesses the nature of a problem quickly, thoroughly understand the expectations of the client and consistently meets those expectations through viable solutions.
5. Understands employee benefits, including plan designs, available riders, cross-sell opportunities, legislation, compliance, emerging trends and stays proactive through self- educating.
6. Positively influences the team members; collaborates effectively to mediate concerns, offer encouragement and praise and build good working relationships.
7. Promotes and offers ideas for improvement.

Business Development:

- Promotion of EBS through sales opportunities, networking groups and referrals.
- Attends training opportunities, reads and shares industry knowledge, regularly participates in coursework to either earn or maintain professional designations.

Administrative:

Uses tools and systems (e.g. SalesForce, Dynamis, various HRIS systems, Microsoft Office Suite, etc.) to enhance the job.

CONTINUING EDUCATION

As a condition of future employment, the Client Manager must:

- Successfully pass their Maryland State Life & Health exam within the first 90 days of employment.
- Must fulfill Maryland State CE requirements on an annual basis
- Attend internal training as needed

REPORTING/ACCOUNTABILITY

Reports to: Director of Client Services
Supervises: None

KNOWLEDGE/EXPERIENCE REQUIRED

- Three to five years of experience (preferred) in benefits, including a strong knowledge of both fully insured and self-insured plans, ancillary lines and current legislation.
- Bachelor's degree (or its equivalent).
- Maryland Life and health license, required.

TALENTS/STRENGTHS REQUIRED

- Organization
- Communication
- Able to prioritize effectively
- Multi-tasking

SKILLS/ABILITIES REQUIRED

- Excellent communication and presentation skills (listens, speaks, and writes well); able to interact effectively with people of various responsibility and authority (employees, key contacts, executives, etc.).
- Able to manage a multitude of details (including paperwork); stays proactive while juggling these issues.
- Possess a natural inclination to reach out, build relationships and uncover issues before the client calls EBS.
- Very comfortable with typical business technology including voice mail, e-mail, word processing, spreadsheets, and presentation software.

PHYSICAL REQUIREMENTS/MISCELLANEOUS

- Valid Driver's License.
- There are no physical requirements for the position.

This position description is not intended to be all-inclusive, but to provide a general scope of the person and the position, outlining the primary responsibilities, reporting structure and knowledge/strengths/abilities required to succeed. It is not a contract.

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