



The Account Manager position is one of the most crucial jobs within the organization. It directly supports the Broker(s) during the sales phase of the business; then once the account is acquired, assumes responsibility, alongside the broker, of maintaining an extremely positive relationship between Arrow Benefits Group and our clients.

ESSENTIAL DUTIES /PERFORMANCE PROFILE

1. Develop and maintain effective working relationships in liaison role with client contacts and insurance company service partner contacts (such as underwriters, sales and service representatives).
2. Proficiently know marketplace; carriers, underwriting requirements & the benefits/services they offer.
3. Keep Broker, Advisers, and supervisor fully informed of all important activities on client accounts.
4. Participate in seminars and classes for skill and knowledge development.
5. Quality check of applications, claims processing and audit enrollment applications (unless there is a designated person you have been assigned who handles these tasks).
6. Preparing and obtaining employee enrollment materials for the Broker to present via benefit fairs, face-to-face enrollment meetings or over the phone enrollment meetings.
7. Assist in the communication of benefits in enrollment meetings.
8. Once Broker has finished with open enrollment, collect and send all forms to appropriate carrier and ensure that everyone is enrolled correctly and in a timely manner.
9. Act as liaison between client and insurance companies in order to independently resolve all service problems. Specifically, assist the client in resolving billing, claim, eligibility, COBRA and customer service problems.
10. Independently manage with input from adviser(s) and Broker employee booklets, enrollment kits, enrollment forms, letters and checklists.
11. Preparing and insuring accuracy on audits, census data and quoting.
12. Be self-sufficient in attaining RFP's from the carrier and creating a presentable comparison for the client.
13. Make regular service/relationship calls to clients, unless broker specifies they will make the call.
14. Preparation of reports deemed necessary by the team leader and or broker.
15. Keep all information on accounts accurate and up to date.
16. Communicate to our clients "Our Value Added Services."

*Please note: to apply for this job, you must have at least two years of previous experience as a Group Health Insurance Account Manager.



QUALIFICATIONS AND JOB SKILLS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below represent the knowledge, skill and/or ability required.

REASONING ABILITY

Ability to define problems, collect data, establish facts, and draw valid conclusions.

CERTIFICATES, LICENSES, REGISTRATIONS

Maintain a current California Life & Health Insurance License.

OTHER SKILLS and ABILITIES

1. Proficient in Microsoft Word, Excel, PowerPoint, Publisher, Outlook and Adobe and able to use multiple technology devices.
2. Ability to perform duties in a high-pressured, fast-paced environment.
3. High degree of critical thinking, organizational and decision making skills as well as a high degree of initiative and attention to detail.
4. Ability to determine work priorities and remain flexible as needs and priorities change.
5. Professional telephone skills and etiquette.
6. Strong written and verbal communication skills.
7. Self-motivated and ability to work independently with limited supervision or within a group or team.

The above statements are intended to be a representative summary of the major responsibilities performed by incumbents of this job. The incumbent's may be requested to perform job-related tasks other than those stated in this description.