



YATES

Commercial & Personal Insurance, Benefits, & Bonds

Job Description

Title: Benefits Account Manager

Classification: Exempt

Department: Benefits Department

Reports To: Benefits Practice Leader

Summary:

Manages existing accounts, renewals, and new business sales. Works with employers to find benefit solutions that best meet their needs. Assists clients through the process of communicating and implementing benefits for their companies.

Essential Functions:

- Manage day-to-day service needs for a book of employee benefits clients
- Coordinate and execute renewal timelines, open enrollment preparation, compliance filings and ongoing client deliverables
- Collect and organize client information to support RFP submissions and benchmarking processes
- Build and maintain long-term client relationships by proactively communicating and anticipating employee benefits, needs and challenges
- Act as a point of contact for employees and provide hands-on claims advocacy helping employees navigate claims or benefit issues and ensuring timely resolution
- Assist clients in resolving benefits administration and processing challenges across carriers and vendors
- Track and follow up on outstanding items with carriers, vendors, and internal teams
- Maintain accurate and organized client records, documentation, and reporting
- Attend client meetings with the Producer and/or Account Executive to conduct face-to-face client and employee education meetings

Knowledge, Skills & Experience:

- Knowledge of Microsoft Word, Excel, PowerPoint, Applied Epic agency management system.
- Strong working knowledge of employer-sponsored benefit plans, insurance products, and regulatory compliance, with 3+ years of in-depth experience servicing employee benefits clients
- Ability to exercise independent judgment while managing competing priorities in a fast-paced, client-service environment
- Excellent time management, organizational skills, and attention to detail. Ability to maintain workflow time management and meet required deadlines.
- Ability to explain complex benefits information in a clear, concise manner, both to clients and their employees. Confident public speaking abilities, including conducting meetings and benefit education sessions for both large and small groups
- Proven problem-solving skills, including timely resolution of claims, benefit administration, and service-related issues
- Team player that works with employers and administrators toward a common goal.

Education, Licensing and Additional Requirements:

- High School degree or equivalent.
- Insurance Agent License. License Continuing Education as required.

Supervisory Responsibilities: N/A

Staff Member Name

____/____/_____
Date

Disclaimer:

This job description indicates the general nature and level of work expected of the incumbent. It is designed to cover or contain a comprehensive listing of activities, duties or responsibilities required of the incumbent. Incumbents may be asked to perform other duties as required.