Kibble & Prentice

Job Description for:
Account Manager, Employee Benefits Division

MAJOR RESPONSIBILITIES:

- Management of ongoing client service relationships for 18-25 clients.
- Maintain open and clear communication channels with Clients, Producers and Internal Partners.
- An average of 25-40% of time out of the office and overnight travel should be expected periodically.
- Communicate due dates, timelines and expectation to clients and partners.
- Identify problems, summarized and develop strategic solutions.
- Install new group insurance contracts for existing clients or new clients effectively utilizing resources to match client needs.
- Administer renewals including preparing appropriate contractual changes.
- Conduct employee meetings.
- Prepare 5500s and summary annual reports for clients.
- Inform clients of ERISA, COBRA, FMLA compliance measures.
- Develop employee memorandum drafts for client to communicate the following; annual renewal changes, enrollment procedures, miscellaneous benefit changes and/or clarifications.
- Develop and maintain excellent carrier relationships.
- Other miscellaneous duties as assigned.

PROFESSIONAL DEVELOPMENT:

- Remains informed regarding industry information and new product information
- Expected to further industry education through insurance courses with intent to pursue an industry designation
- Expected to be a strong member of the community and further personal development in volunteer opportunities.

TRAINING WILL INCLUDE:

- On-site ongoing training provided for all above duties
- Off-site training as required for continuing education requirements

CORE JOB OBJECTIVES:

- Establish effective working relationships with Internal Partners, Clients and Carriers
- Demonstrate a "whatever it takes" attitude to ensure client satisfaction and to support key Kibble & Prentice initiatives
- Work with Internal Partners, Clients and Carriers to ensure accurate and timely response to all outstanding issues
- Work with all clients and partners in a manner that fosters mutual respect and teamwork
- Respond to requests from all Clients and Partners by stated timeframes
- Project a professional image in action and appearance

- Consistently be on time for work and all scheduled meetings and training classes
- Review emails within 24 hours, client voicemails within 2-4 hours

REQUIRED SKILLS & QUALITIES:

- Minimum 3 years prior group insurance experience
- 4 year college degree or industry specific designation preferred
- Must currently hold life and disability insurance license (or must obtain it within 4 months following date of employment) and retain license by meeting the continuing education requirements.
- Excellent communication skills, both oral and written
- Strong presentation skills
- Strong attention to detail and ability to self-check work
- Excellent time management skills
- Task oriented, excellent organizational skills, ability to prioritize work load
- Enthusiastic attitude, cooperative team player, adaptable to new or changing circumstances, professional demeanor, sensitive to client needs, self-motivated, creative and innovative
- Excellent problem solving skills
- Strong verbal and written communication skills
- High level of computer literacy including working knowledge of Windows2003, Excel, Word
- Prior customer service experience is preferred