# Job Description

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| --- | --- | --- |
| Position Title | Department | Reports to |
| Employer Benefits Account Manager |  | President |
| Employment Status | FLSA Status | Effective Date |
| [ ]  Temporary [x]  Full-Time [ ]  Part-Time | [ ]  Non-Exempt [x]  Exempt | 11/1/2021 |

## Position Summary

The Employer Benefits Account Manager coordinates general business activities and the needs of the company through courteous and timely service. This role will serve as the liaison between HRO Enroll clients and the benefit service team. This person should be a competitive self-starter and be highly motivated with an established passion to win.

## Essential Duties and Responsibilities

The essential functions include, but are not limited to the following:

* Answering, assisting, and directing all incoming telephone calls to appropriate parties in a professional and courteous manner
* Communicate with potential customers on a regular basis, providing solutions as needed, and oversee all sales activity in your assigned.
* Coordinate with other members of the company as needed to help generate solution-driven ideas for sales success.
* Submit sales activity & update information regularly into the company’s CRM software and maintain clean and updated records for all leads and customers.
* Lead client discovery to create accurate quotes in a timely manner.
* Active Insurance license in TN or willing to get
* Performing related clerical work such as typing, filing, and sorting mail distribution
* Using applicable software programs to create inventories, letters, and other business-related documents
* Provide potential clients with updates and information as requested or needed.
* Providing administrative support when needed
* Performing other duties as assigned

## Minimum Qualifications (Knowledge, Skills, and Abilities)

* Associates or Bachelor’s degree required, or commensurate insurance industry experience
* Insurance experience as an insurance agent or other position is preferred but we will provide training as needed for the right fit and skillset
* Excellent customer service and communication skills.
* Competency in Microsoft applications including Word, Excel, and Outlook.
* Able to work comfortably in a fast-paced environment.
* Experience working as part of a team.
* Prior experience with benefits administration & CRM activities
* Excellent organization skills
* Ability to multi-task

## Physical Demands and Work Environment

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the functions. While performing the duties of this position, the employee is regularly required to talk or hear. The employee frequently is required to use hands or fingers, handle or feel objects, tools, or controls. The employee is occasionally required to stand; walk; sit; and reach with hands and arms. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this position include close vision, distance vision, and the ability to adjust focus. The noise level in the work environment is usually low to moderate.

## Note

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an “at will” relationship.

### Reviewed with employee by

### Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name (print): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Received and accepted by

### Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name (print): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The company is an Equal Opportunity Employer, drug free workplace, and complies with ADA regulations as applicable.