Preferred Health Care
Job Description

Job Title: Client Manager, Group Health Accounts
Reports To: Director, Implementation and Client Management

SUMMARY

The Client Manager is a hybrid position that will service and retain a portfolio of self-funded group medical & health insurance business. The client manager will develop and execute group-specific account management strategies which meet client objectives; achieve annual retention goals and financial objectives while providing exceptional service. The client manager will partner with internal teams to share data, refine product lines, and create new sales around Self-Funded Employer Health Plans and Wellness and ancillary product lines. The Client Manager is also responsible for the preparation of proposals, meeting materials and/or sales collateral during the account renewal process.

PHC's comprehensive training program is designed for the right individual that is eager to learn and grow their insurance career within the Medical and Employee Benefits Insurance field. In addition to our training program, we offer a hybrid work environment, excellent employee benefits, paid time off, and so much more!

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following.

- Functions as the primary contact and supports customer throughout the relationship by resolving complex client problems in a timely and professional manner; taking responsibility for customer satisfaction and loyalty; and suggesting improved processes to further enhance the quality of customer service delivered to the client. Responsible for the resolution of day-to-day account service issues.
- Responsible for the implementation of new clients at the time of sale. Prepares documents and necessary materials to educate the client in the day-to-day workings of their self-funded medical plan. Client Manager delivers enrollment, benchmarking, financial, and utilization data based on financial review.
- Plans and conducts open enrollment meetings, clearly detailing the value of the new plan and encouraging enrollment. Also, handles the internal process of new group implementation, working in tandem with other departments, as needed.
- Builds meaningful, long-term relationships and rapport with assigned clients. Responsible for the client renewal process, assisting with the negotiation of renewal rates, post enrollment paperwork and actual employee open enrollment meetings. Retains and grows existing business and ensures positive account relationships are maintained.
- Assists in the preparation of benefit design analysis for specialized proposals and quotes. Gathers financial reports and performs basic financial analysis on utilization data and market research. Develops detailed specifications for implementation of new products for clients, including the proposal of ancillary product lines and expanded services to existing clients
- Builds and maintains strong relationships with peers and internal departments to ensure client needs are fulfilled timely and effectively.

- Plans and carries out all quarterly and annual reporting meetings with employer, utilizing performance reports and coordinating with broker and wellness specialist.
- Works closely with outside vendors and partners responsible for account processing and set-up to ensure accurate and seamless service delivery. Develops documents and processes to ensure effective communication via work plans for all account implementation activities.
- Travel required to meet face-to-face with clients and their employees.

QUALIFICATIONS

Required qualifications for this position include:

- Ability to quickly learn new tasks with strong attention to detail
- Skill with MS Office, with particular emphasis on Excel
- Must be professional, confident and poised to work in person, and virtually, with brokers, clients, and employees
- Valid PA driver's license
- Must receive PA Life, Accident and Health Insurance license within 90 days of employment. Training and cost of exam will be provided

Preferred Job-Related Experience

- Previous professional health care / managed care client management experience
- Knowledge of Health and Wellness programs and products
- Knowledge of group ancillary insurance products (Dental, Life, Disability and Vision)
- Sales, Marketing and Customer Service experience is desirable