**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 is responsible for servicing and retaining a portfolio of self-funded group medical & health insurance business. Duties include developing and executing comprehensive 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. The role will also evaluate, recommend, and implement processes to ensure that account objectives are met.

**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.
- Travel required to meet face-to-face with clients and their employees.

- 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.

**QUALIFICATIONS**

**Required qualifications for this position include**:

- Previous professional health care / managed care client management experience required
- Licensure to sell health insurance in Pennsylvania preferred. Must receive license within 90 days of employment
- Valid PA driver's license
- Skill with MS Office, with particular emphasis on Excel
- Must be skilled at managing multiple projects and setting appropriate priorities

**Essential Job-Related Experience**

- Minimum of 3 years of client management experience with a minimum of 2 years of experience in the health care field preferred. Self-funded experience preferred.
- Knowledge of Wellness programs and products, and the ability to explain the benefits of integrating wellness within traditional insurance product lines preferred.
- Knowledge of group ancillary insurance products (Dental, Life, Disability and Vision) preferred.
- Experience with bswift enrollment system and Salesforce is an asset.
- Sales, Marketing and Customer Service experience is desirable.

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| Department Manager Approval: Susan M. Dague<br>Title: Director, Implementation & Client Management | Approved by: E. Elm<br>Title: CEO |
| Date: 7/18/23 | Date: 7/14/23 |