INFINITY
benefit solutions
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Milwaukee, WI 53202
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Account Manager

Position Summary: An Account Manager interfaces with a group of clients to strategize and propose viable solutions to manage the menu of benefit options that the client offers to its employees. Account Managers partner with clients and assist them with1) the Client Roadmap, 2) their annual renewal process, and 3) other possible options that would enhance or meet the goals of the client. The Account Manager is expected to increase the revenue of the existing client base by adding additional lines of benefits and products offered by Infinity Benefit Solutions, Inc. The end product of this partnership is intended to add value to the client, enabling the client to be competitive in their own industry. Account Managers quickly assess the nature of any given problem, understand thoroughly the expectations of the client, and consistently meet or exceed those expectations. Account Managers must contribute to and flourish in a team environment and engage in regular professional development.

Key Responsibilities

Partners with each client in the book of business. The partnership is demonstrated through:

- Regularly engages with client four times per year by utilizing Infinity's Client Roadmap
- Understands key business issues facing the client, and brings viable solutions to the client to address those needs;
- Acts intentionally to retain clients and succeeds;
- Masterfully collects, organizes, and reviews relationship information.
- Understands thoroughly (and stays knowledgeable of) employee benefits, including plan designs, available riders, health care reform (ACA), legislation, and emerging trends.
- Conducts pre-renewal discussions with clients to determine goals and objectives for annual renewal. This is part of the Client Roadmap process.
- Competently executes a high volume of renewals each month, marketing groups when necessary, and providing simple, organized, options for renewal decisions.
- Acts as project manager for annual plan renewal and implementation. Anticipates concerns developing from the renewal process; proactively checks and verifies all information (new rates, employee enrollments and changes, ID cards, etc.); immediately addresses and solves problems generated through the renewal process.
- Communicates thoroughly and clearly with all team members concerning client issues, renewals, and proactive work.
- Positively influences team members, offers encouragement and praise, and builds good working relationships.
- Promotes and offers ideas for improvement.
- Attends training opportunities, reads and shares industry knowledge, regularly participates in coursework to either earn or maintain professional designations.
- Assesses the nature of a problem quickly, understands thoroughly the expectations of the client, and consistently meets those expectations through viable solutions.

Reporting/Accountability
Reports to: Vice President- Sales and Account Management

Knowledge/Experience Required
- Three to five years of experience in benefits including a strong knowledge of fully-insured medical plans, ancillary lines (dental, life, disability, FSA, vision) and current legislation
- Experience managing a high volume of clients and renewals
- An earned bachelor's degree (or its equivalent)
- Wisconsin Health and Life insurance license
- Experience with Zywave, Form Fire, Easy Apps, Microsoft Word, Excel and Power Point
- Professional Designations (RHU, REBC, CACCOUNT MANAGER) preferred

Talents/Strengths Required
- Organization
- Communication
- Ability to prioritize effectively
- Multi-tasking

Skills/Abilities Required
- Excellent communication and presentation skills (listens, speaks, and writes well); able to interact effectively with people of various responsibility and authority (employees, key contacts, executives, etc.).
- Highly organized and able to handle a high volume of client renewals.
- Ability to implement and execute an efficient process for clients.
- Able to manage a multitude of details (including paperwork); stays proactive while juggling these issues.
- Possess a natural inclination to reach out, build relationships, and uncover issues proactively prior to client initiating a phone call
- Very comfortable with typical business technology, including voice mail, e-mail, word processing, spreadsheets, and presentation software.

Physical Requirements/Miscellaneous
- Valid Driver's License.
- Reliable vehicle.
- Some light to moderate lifting & moving of enrollment supplies/materials.