

Employee Benefits Practice Position Description

Title: **Client Coordinator**

Reports To: Senior Vice President – Regional Employee Benefits Practice Leader

Date: September 9, 2016

POSITION SUMMARY:

To assist Client Managers and Client Executives with client questions, proposals, marketing, rate negotiation, sales and service support including claims resolution.

MAJOR DUTIES AND RESPONSIBILITIES:

1. Timely respond to Client Manager and Client Executives requests for information or help.
2. Handles in-coming calls from assigned clients regarding benefit questions, claim issues, eligibility, billing and other support issues.
3. Coordinate with medical and ancillary carriers to ensure the timely resolution of client issues.
4. Marketing of cases for existing business renewals and new business; marketing information includes gathering census & experience information, plan designs, rates and previous carrier information.
5. Review marketing options from carriers and provide plan options, based upon client needs, via a proposal spreadsheet.
6. Work with carries to ensure the timely processing of case submissions; work with carriers to ensure ID cards are received by the client in a timely fashion.
7. Support Client Manager with enrollment materials, information and presentations for meetings with clients.
8. Support other team members and take calls when other team members are unavailable.
9. Provide backup support to Client Manager when not in the office
10. Proof proposals and benefit summaries for other team members.
11. Attend client meetings when necessary.

CONDITIONS OF EMPLOYMENT:

- Must have a BA/BS degree or at least 5 years of Benefits experience
- Working knowledge of insurance products and usage
- Intermediate knowledge of computer and word processing programs such as Microsoft Office Programs (Word, Excel, Outlook)
- Ability to communicate orally and in writing to others

- Ability to set priorities and reprioritize as required to manage work flow
- Ability to work independently from others with little or no supervision.
- Ability to work in a team environment
- Ability to work well and keep a level head under times of stress
- Ability to take direction from multiple authority figures