Custom Design Benefits

POSITION: Director-Account Management and Sales
DEPARTMENT: Sales/Compliance
REPORTING MANAGER: Vice President

JOB RESPONSIBILITY SUMMARY:

Responsible for managing Group Account Managers, Sales Managers, and Stop Loss Analysts. Leads Sales Managers in generating new business for all services lines and Account Managers for cross selling and retention.

ESSENTIAL FUNCTIONS:

Account Management:

- Partner with all CDB departments to improved workflow and service support
- Develop and measure use of standardized tools and processes/procedures for AM team to perform regularly scheduled duties including new client/service implementations, ultimate service plan, value presentations, Issue Management log, PBM onboarding documentation, PPO documentation, etc.
- Identifies and facilitates team and individual support and training needs
- Act as escalated customer contact
- Facilitates bi-weekly Account Management team meetings
- Identifies opportunities for cross-training
- Assigns and manages SME's
- Represent AM team as lead on all CDB projects
- Prepare internal and external documentation/communication materials for assigned customers
- Work closely with customers and brokers to ensure eligibility, plans, banking, contracts and website are set up timely & accurately
- Maintain plan profile for all groups (new and existing)
- Maintain new customer implementation and termination checklists
- Review Summary Plan Description for customers
- Train customers on website functionality

Sales:

- Leads Sales Managers in generating new business for all services lines
- Fostering broker relationships. Targeting prospects with key brokers. Develop and maintain positive relationships with customers and brokers
- Leading, organizing and planning formal presentations and meetings with brokers

Staffing:

- Conduct quarterly performance evaluations
- Weekly or bi-weekly touch base with all team members
- Interview potential new team members and provide feedback
- Identifies and facilitates team and individual support and training needs
- Identifies opportunities for cross training
- Responsible for the counseling needs of individual team members, facilitates termination and provides documentation supporting this recommendation
- Setting and executing goals and objectives for the team
- Performs annual performance evaluations of team members
- Function collaboratively with the CEO/President, Vice President Sales/Compliance, and other department leaders
- Motivate direct reports, providing coaching and development opportunities for continued growth
- Attend regularly scheduled meetings and report updates on new client implementations and renewals

ESSENTIAL SKILLS AND EXPERIENCE:

- Extensive experience and understanding of all aspects of healthcare, self-funding, and third party administration to include: stop loss, plan design, FSAs, HRAs, FMLA, and COBRA
- Proven experience implementing client management processes and managing client facing key exempt team members to achieve company goals
- Prior supervisory/management experience
- Knowledge and application of consultative sales approach
- Ability to develop relationships at all levels.
- Advanced problem solving and critical thinking skills
- Strong listening and follow-up skills
- Understanding of the significance of the customer relationship and having a desire to constantly enhance that relationship
- Ability to motivate team and individuals to reach key objectives
- Provide feedback and ongoing development/training of employees
- Provide support for Sales Managers and Account Managers
- Ability to work with little direction and have the ability to prioritize work

Qualified candidates should send a cover letter, resume and salary expectations to careers@customdesignbenefits.com.