



## Account Manager

**Custom Design Benefits** is the Cincinnati area's largest independent, full-service Third Party Administrator (TPA) of self-funded health benefit plans.

***Work up to two days from home with a hybrid work schedule!***

**Custom Design Benefits** is big on creating a collaborative workplace that encourages, recognizes and celebrates their employees while also providing great benefits including:

- Medical, Dental and Vision Insurance
- Primary Care and generic prescriptions with no co-pay
- Short & Long Term Disability
- Life Insurance
- Paid Time Off
- Nine Paid Holidays
- Competitive match 401(K)
- A fun work environment that promotes work/life balance and process improvement
- Professional Development
- Quarterly bonuses
- Tuition reimbursement

**Job Summary:** The Account Manager is responsible for implementing new clients, assisting with client renewals and maintaining compliance with federal laws. The Account Manager must develop and maintain relationships with CEOs, CFOs, and HR representatives. Also responsible for providing excellent customer service to all clients and members.

### **Responsibilities:**

- Responsible for working with the Sales team to onboard and integrate new clients to achieve a successful implementation as measured by the new client survey. Help customers through email, phone, online presentations, screen-share and in person meetings
- Develop a trusted advisor relationship with key accounts, customer stakeholders and executives
- Prepare and present client reporting to help drive benefit decisions to achieve client's goals
- Prepare internal and external documentation/communication materials for assigned customers.
- Manage implementation process with the customer & internal team members (eligibility, operations, claims, finance, etc.)
- Responsible for keeping current clients satisfied and delivering exceptional client service on a day-to-day basis
- Work closely with the customer & broker to make sure eligibility, plans, banking, contracts & website are correctly set up.
- Communicate plan design changes & implementations internally & support operations on customer questions
- Forecast and track key account metrics according to team performance objectives
- Responsible for keeping current clients satisfied and delivering exceptional client service on a day-to-day basis
- Maintain Salesforce information for sales opportunities and client information.
- Create and maintain medical and pharmacy data reporting using reporting technology



- Train new customers on website functionality
- Other duties as assigned.

**Essential Skills and Experience:**

- Proven account management, group insurance and/or other relevant experience
- Demonstrated ability to communicate, present and influence credibly and effectively at all levels of the organization, including executive and C-level
- Experience in delivering client-focused solutions based on customer needs
- Proven ability to manage multiple projects at a time while paying strict attention to detail
- Excellent listening, negotiation and presentation skills
- Excellent verbal and written communications skills
- Self-motivated and able to thrive in a results-driven environment
- Natural relationship builder with integrity, reliability and maturity
- Ability to prioritize among competing tasks
- Critical thinking and problem-solving skills
- Understanding of stop loss insurance & reporting / filing process
- Understanding of the significance of the customer relationship & having a desire to constantly enhance that relationship

**Fundamentals:** 1. Take Care of Our Clients; 2. Deliver Results; 3. Get the Facts; 4. Be a Fanatic About Response Time; 5. Own It; 6. Be a Life Long Learner; 7. Honor Commitments; 8. Get Clear on Expectations

**StrengthsFinder:** Achiever-E, Analytical-S, Command-I, Communication-I, Learner-S, Responsibility-E, Positivity-R, Restorative-E, Self-Assurance-I, Strategic-S

*Custom Design Benefits is an Equal Opportunity Employer*