

TITLE: Client Manager/Senior Client Manager Coordinator (CMC/SCMC)

JOB SUMMARY: (What is done and why.)

Proactively serves as an internal liaison between HBHRIQ, Client Managers and Senior Client Managers so as to maximize client satisfaction, retention and nurturing.

ESSENTIAL FUNCTIONS: (Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.)

1. Under the direction of HBHRIQ's Leadership and Director of the Client Manager Practice Area, partners on overall client account coordination, administration and assistance.
2. Provides support, coordination and assistance to Client Managers/Senior Client Managers regarding Customer-Client Relationship Management (CRM) tool to maintain current, ongoing and accurate client information and data.
3. Responsible for onboarding new clients, including but not limited to creating CRM Account and Policy(s) Profiles. Accountable to notifying HBHRIQ Practice Areas in the event the scope of client work is impacted immediately by the Practice Area(s).
4. Assist the Client Managers/Senior Client Managers, with researching and responding to requests for information for client and carrier issues, such as billing, claims submission, interpretation of contracts, customized benchmarking, claim and premium experience data on a frequency as so denoted to be accountable to client care and commitment.
5. Provides assistance in developing and streamlining Client Manager Practice Area templates and standards of client care and commitment.
6. Provides assistance to Client Managers/Senior Client Managers with coordinating and managing communications between clients, carriers, vendors and HBHRIQ regarding established accounts.
7. Assist the Client Managers/Senior Client Managers with initiating, coordinating and managing Requests for Proposals for carriers and vendors in conjunction with the client, so as to obtain sufficient information to meet client's benefit offering(s) and budgeted benefit costs.
8. Provides assistance to the Client Managers/Senior Client Managers with compiling data, account information, employer and employee presentations for review and presentation to client on a regular basis, depending on the specific client's needs and size of account.
9. Provides and performs internal coordination and assistance to the Client Managers/Senior Client Managers in conjunction with a carrier implementation and/or the annual renewal task.
10. Attends planned HBHRIQ Team and Practice Area meetings to communicate progress reporting on assigned activities and keep team members informed of ongoing work.
11. Along with Client Managers/Senior Client Managers and other HBHRIQ Members coordinates and collaborates on special projects on behalf of the firm or clients in order to meet HBHRIQ's business or organizational needs. For example, Vermont

Employee Benefits Survey Annual Project, Client Stewardship Reporting, Client Benchmarking, Employee Benefit Guide and Benefit Summary.

12. Active Participant to internal self-managed, working teams, e.g. Client Manager Practice Area, Internal Working Group. Attends or participates as a committee member on internal practice areas projects as assigned.
13. Familiar with and knowledgeable of technology solutions and applications to meet client or organizational needs.
14. Maintains strict confidentiality of all client and corporate data at all times
15. Embraces and actively practices HBHRIQ's Vision, Mission and Values.
16. Contributes to HBHRIQ Team effectiveness by bringing a positive approach to collaboration and coordination, responding dynamically to new challenges and conditions, and recognizing interdependencies.
17. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

KNOWLEDGE AND EXPERIENCE: (Minimum education, experience, technical and communication skill levels and licenses/certificates normally required to perform the duties of this position.)

1. Minimum of two years work experience in a customer service setting.
2. Minimum of two years work experience in the employee benefits, insurance, or human resources industry.
3. Demonstrated ability to acquire necessary insurance licenses. Within six months active in the position, possession of Group Life, Health and Accident Insurance Licenses from the State of Vermont.
4. Ongoing and adequate knowledge of employee benefits regulatory and compliance environment.
5. Proficiency in the use of personal computers including: Microsoft Outlook, Excel, Word, PowerPoint, e.g. MS Office Suite applications.
6. Strong interpersonal skills, as well as written and oral communication skills are required.
7. Ability to handle multiple tasks and projects concurrently with limited or direct supervision.
8. Demonstrated ability to be organized, detail oriented and accurate essential.

WORKING CONDITIONS: (Typical working conditions associated with this type of work and environmental hazards, if any, that may be encountered in performing the duties of this position.)

Internal- This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

External- Limited travel in Vermont may be required and travel area is subject to change.

PHYSICAL DEMANDS: (The physical effort generally associated with this position.)

While performing the duties of this job, the employee is regularly required to talk and hear. This position requires the ability to occasionally lift office products and supplies, up to 20 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus. Work normally requires finger dexterity and eye-hand coordination to operate computer keyboards at a moderate skill level.

POSITION TYPE/EXPECTED HOURS OF WORK:

This is a full-time position, and hours of work and days are Monday through Friday, 8:00 a.m. to 4:30 p.m. A flexible working arrangement may be possible if the arrangement meets the needs of the employer and employee.

SUPERVISED BY:

Supervision and Mentoring is coordinated and received from the Director of Client Manager Practice Area, Client Managers/Senior Client Managers.