

## ACCOUNT MANAGER - EMPLOYEE BENEFITS



BIS is an independently owned benefit and commercial insurance broker located in Roswell, GA. Our mission is to serve others through responsive insurance advising. We aim to excel in our industry while maintaining our commitment to service, integrity, faith, and excellence. We have an unwavering commitment to both our employees and our clients. This has earned us the prestigious title of one of the Best Places to Work by The Atlanta Business Chronicles for multiple years and Best Places to Work In Insurance.

The Account Manager (AM) ensures client satisfaction and retention through strategic relationship management and superior customer service. The AM leads the renewal processes, facilitates open enrollment meetings, maintains carrier relations, and collaborates with internal teams.

## KEY RESPONSIBILITIES

- Developing strong relationships with clients to foster loyalty and ensure successful annual renewals.
- Leading the renewal process, initiating conversations with clients well in advance, and coordinating with carriers to gather necessary information.
- Facilitating Open Enrollment (OE) meetings for new and renewal business, educating employees on benefits and addressing any inquiries.
- Maintaining positive relationships with carriers to enhance BIS's market position and boldly requesting assistance to meet client needs.
- Leading internal teams through effective collaboration, communication, and participation in meetings and activities.
- Demonstrates proactive communication by promptly informing clients and key decision makers about carrier changes,
- Thrives in environments that demand quick action and constant engagement, preferring productivity over idleness.
- Proficiently utilizes CRM systems and accurately manages workflow updates to streamline internal processes.

## QUALIFICATIONS

- Must meet our value system.
- 3 or more years of experience in employee benefits, marketing, service, or account management would be helpful but not required.
- Life and Health License helpful but not required at time of interview. It would be required to take the position.
- Proficient in Microsoft Office.
- Strong communication skills, both written and verbal.
- Ability to multitask, establish priorities, and quickly build rapport with clients and prospects.
- Self-motivated, deadline-oriented, and committed to continuous skill development.

TO BE A TEAM MEMBER AT BIS, WE REQUIRE THESE VALUE SYSTEMS :

### Follow Through

Solve all items and provide updates

### Humble

Not arrogant

### Heart to Serve

Genuinely care about others

### Integrity

Do the right thing

### Heart to Learn

Care about your craft and want to improve in life

### Perspective

Don't take yourself too seriously and family is priority

