

BENEFITS RENEWAL SPECIALIST



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 recognition of being named one of the Best Places to Work by the Atlanta Business Chronicle for multiple years, as well as one of the Best Places to Work in Insurance.

The Benefits Renewal Specialist (BRS) supports clients with employee insurance benefit renewals, working closely with an Account Manager (AM). If a renewal requires reviewing alternative carriers, the BRS coordinates the marketing process, prepares proposals, and ensures all data is accurately maintained.

KEY RESPONSIBILITIES

- **CRM Management:** Maximize the use of our Customer Relationship Management (CRM) system to track and manage client interactions, renewal activities, and follow-up actions.
- **Accountability Timeline Management:** Implement our accountability timeline for benefit renewals, ensuring all deadlines are met.
- **Quoting and Proposal Generation:** Prepare and generate accurate quotes and proposals for benefit plans based on client needs.
- **Document Processing Coordination:** Coordinate the processing of all relevant documentation related to benefit renewals, including contracts, plan summaries, and compliance forms, ensuring accuracy and timely submission.
- **Open Enrollment Administration:** Administer the open enrollment process for new and existing clients.
- **Client Communication:** Serve as the point of contact for clients during the renewal process, addressing inquiries, providing updates, and fostering strong relationships to enhance client satisfaction and retention.

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.
- Proficient in Microsoft Office.
- Strong editing, proofreading, and written communication skills.
- Strong communication skills, both written and verbal.
- Ability to quickly learn industry-specific software.
- 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

