

Preferred Health Care Job Description

Job Title: Client Manager

Reports To: Director, Implementation and Client Management

SUMMARY

This position will retain and grow a portfolio of self-funded group medical & health insurance business, focused on service, growth and profitability. The client manager will develop and execute comprehensive group-specific account management strategies which meet client objectives; achieve annual retention goals and financial objectives while providing exceptional service. The client manager will partner with internal teams to share data, refine product lines and create new sales around Self-Funded Employer Health Plans and Wellness and ancillary product lines. The Client Manager is also responsible for the preparation of proposals, meeting materials and/or sales collateral during the account renewal process. The role will also evaluate, recommend and implement processes to ensure that account objectives are met.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following.

- Functions as the primary contact for the resolution of day-to-day account service issues. Supports customers during the implementation of sales contracts and throughout the relationship by resolving complex client problems in a timely and professional manner; taking responsibility for customer satisfaction and loyalty; and suggesting improved processes to further enhance the quality of customer service delivered to the client.
- Builds and maintains strong relationships with internal departments to ensure client needs are fulfilled timely and effectively.
- Responsible for the implementation of new clients at the time of sale. Prepares documents and necessary materials to educate the client in the day to day workings of their self-funded medical plan. Client Manager plans and conducts open enrollment meetings, clearly explaining the value of the new plan and encouraging enrollment. Also, handles the internal process of new group implementation, working in tandem with other departments, as needed.
- Builds strong long-term relationships and rapport with assigned clients. Responsible for the client renewal process, assisting with the negotiation of renewal rates, post enrollment paperwork and actual employee open enrollment meetings. Retains and grows existing business and ensures positive account relationships are maintained.
- Assists in the preparation of benefit design analysis for specialized proposals and quotes. Gathers financial reports and performs basic financial analysis on utilization data and market research. Develops detailed specifications for implementation of new products for clients, including the proposal of ancillary product lines and expanded services to existing clients.
- Plans and carries out all quarterly and annual reporting meetings with group, utilizing performance reports and coordinating with broker and wellness specialist.

- Provides support to colleagues at Preferred Health Care and Lancaster General Health for resolution of day to day operational, member and client issues. Responsible for ensuring all resolution communication has been successfully handled.
- Works closely with outside vendors and partners responsible for account processing and set-up to ensure accurate and seamless service delivery. Develops documents and processes to ensure effective communication via work plans for all account implementation activities.

QUALIFICATIONS

Required qualifications for this position include:

- Previous professional health care / managed care client management experience required.
- Licensure to sell health insurance in Pennsylvania preferred. Must receive license within 90 days of employment.
- Valid PA driver's license.

Essential Job-Related Experience

- Minimum of 3 years of client management experience with a minimum of 2 years of experience in the health care field preferred.
- Knowledge of Wellness programs and products, and the ability to explain the benefits of integrating wellness within traditional insurance product lines preferred.
- Knowledge of group ancillary insurance products (Dental, Life, Disability and Vision) preferred.
- Experience with bswift enrollment system and Salesforce is an asset.
- Sales, Marketing and Customer Service experience is desirable.