

Voluntary Benefits Manager, Employee Benefits Division

Position Title: Voluntary Benefits Manager
Department: Employee Benefits
Location: Kingston, MA
Reports to: VP, Director of Employee Benefits
Date: March 2015

Job Summary

Oversee and Manage Voluntary Benefits Sales, Service and Billing Administration personnel. Work to drive results while maintaining a positive work environment.

Major Responsibilities

Sales and Marketing Management

- Manage the sales and marketing component of the VB Department
- Provide analysis of sales and marketing initiatives
- Organize, request and maintain all marketing and sales materials for VB Sales as needed
- Proofread and edit marketing materials and work to completion with accurate information
- Coordinate marketing initiatives with Marketing Department and EBD Director.
- Provide growth of accounts through a variety of sales and marketing initiatives for each accounts
- Improve and foster excellent relationship with group's key personnel
- Provide accurate and timely reports on sales and marketing activity in VB
- Review, analyze and communicate necessary steps or suggestions based on reporting
- Research and provide opportunities for Sales Staff employee development
- Coordinate with EB Account Executives and EB producers on all shared employer group accounts
- Set individual sales goals based on VB Department needs as dictated by Executive Management
- Present and communicate benefits information during employee meetings, benefit fairs and other such public events

Service Management

- Facilitate timely and comprehensive communication between the sales and service team to allow for total account management
- Assist Account Executive/Client Managers/Producers in the transition of an account from prospect to client on the VB side
- Take lead on the onboarding of a new account in regards to service of VB, working in alignment with the AE/CM from the Core team if applicable
- Audit processes and data in the varying systems using a defined and consistent process
 - Adhere to an audit schedule and program
- Document service issues and meetings/phone calls with client. Also document conversations and follow-up on issues with clients.
 - Communicate the issue to Producers to keep them aware but take lead on direct contact with the client

General

- Consistently look to create efficiencies across the VB group
- Track status of P/C goals each month and motivate employees to meet or exceed goals
- Provide appropriate praise and redirection when needed
- Act as resource to staff for coverage, questions, troubleshooting and resolution of issues
 - Direct staff to appropriate resource(s) for resolution or assistance with questions, issues, coverage etc. Reinforce use of Agency and carrier resources ie: Intranet, carrier sites, etc.
 - Act as Department resource for any escalated claims or customer service activity
- Appropriately delegate tasks to the appropriate team member and ensure accuracy and completion
- Monitor and manage office backlog, attendance, coverage and monthly reports for Voluntary Benefits including PL areas within Voluntary Benefits
- Brief and inform staff on ongoing Agency and carrier information, updates, announcements and all other communications as needed.

- Master and stay current with all Agency and carrier technology, products and services, underwriting and general practices and procedures
- Promote and monitor quality of customer service and client interactions
- Conduct and/or coordinate meetings with office personnel and carrier representatives for education and communication as needed
- Participate in department interviews as requested
- Prepare and present all performance reviews with the immediate supervisor present
- Identify personnel issues, and performance or training gaps
- Foster and maintain good relationships between carrier and agency personnel
- Listen, motivate and manage in a respectful, professional and courteous manner
- Support and encourage staff in matters of workload, performance and responsibilities. Individually and collectively recognize good performance and achievements
- Promote agency culture and core values to foster and promote positive morale
- Make immediate Supervisor aware of incidents, activities and matters which may extend beyond Personal Lines department where further or escalated attention may be required.
- Attend and participate in Agency and carrier meetings and functions
- Attend community networking and Agency social and business events etc.
- Participate in educational and self development programs determined to be beneficial to the career development of this position.
- Other duties or special projects as assigned
- Participate in P/L meetings

Job Requirements & Qualifications

- Proactive, independent, problem-solving, results oriented professional
- Demonstrated management skills and ability to interact with people for positive results
- High level of organizational skills
- Strong sense of urgency when the situation demands it
- Ability to look at a situation, problem or challenge from different perspectives to determine the appropriate reaction
- Positive, passionate, enthusiastic and motivational management style
- Maintain confidentiality with personnel, carriers and clientele information and situations
- Comprehensive experience and thorough understanding in all areas of Voluntary Benefits and Personal Lines insurance
- Comprehensive understanding of all Voluntary Benefits and Personal Lines related technology: websites, systems, applications, rating etc.
- Ability to work across all areas of the organization and with a variety of personnel and personalities
- Exceptional and effective communication ability
- Strong project and time management skills
- Strong critical thinking, active listening and assessment skills
- Ability to establish trusting, lasting relationships with employees and clientele
- Highly professional and polished demeanor, conduct and appearance
- Proven ability to interact professionally, patiently and courteously with all employees and carriers
- Attention to detail and big picture focus in all employee and client interactions
- Highly computer literate with advanced knowledge of Epic, Winrater, Common Census and other Agency and Company programs
- College Degree preferred
- Ability to work off hours as required; flexible work schedule
- Travel is required
- Coverage during disaster events (Hurricane, Blizzard, Power Outages etc.) mandatory
- Remain calm, courteous and professional at all times
- Active Property/Casualty and L/A/H licenses

Summary: *The statements contained in this job description reflect the general details as necessary to describe the principal functions of this job, the level of knowledge and skill typically required, and the scope of responsibility. It should not be considered an all inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absences or relief, to equalize peak work periods or otherwise to balance the workload. This description is not intended as a contract and is subject to change.*