# Client Executive Service – Bay Area

BARNEY&BARNEY LLC

**Department:** Employee Benefits
**Reports To:** Principal, Employee Benefits
**Status:** Exempt
**Revision Date:** February 2008

## Summary:

Responsible for retention of existing business and the development of business within those assigned accounts. Client Service Executive associates act as a leader for the Client Service Team members to include Benefit Analysts and Client Managers.

## Essential Duties and Responsibilities:

- Oversee ongoing client service activities.
  - Meet with the client throughout the year to ensure a high level of service and that client expectations are being met.
  - Responsible for meeting business retention goals.
  - Participate in development of new business with existing clients by rounding out programs with additional and/or increased lines of coverage.
  - Develop strong business relationships and client trust.
  - Ensure client compliance with annual Form 5500 filing procedures as applicable.
  - Advise Client Service Team, if needed, in resolving routine client concerns. Investigate any reoccurring and non-routine client and carrier concerns and bring to a successful resolution.

- Manage the renewal of existing plans.
  - Coordinate coverage placement through instructions provided to Client Service Team.
  - Provide direction to Client Service Team in the preparation of employee communication materials.
  - Advise, inform and involve Client Sales Executive as required in marketing process.
  - Prepare and present renewal outcomes to the client in a timely manner.
  - Recommend improvements based on changing employee benefit legislation, suggest strategies to address client concerns, and provide resolutions if discrepancies, errors or inconsistencies are contained within the information.
  - Conduct employee meetings to communicate benefit options as needed. Responsible for reviewing contracts, plan documents, Summary Plan Descriptions and other legal documents for accuracy and ensuring all material is sent to client in a timely manner.

- Act as a leader for Client Service Team members.
  - Create an environment oriented to trust, open communication, and cohesive team effort.
  - Facilitate problem solving and collaboration when faced with client difficulties.
  - Focus the team on client requirements, familiarizing them with client specifications, work procedures and processes, quality standards, techniques and tools to support performance.
  - Provide necessary business information to enhance the team's professional development.
  - Ensure deliverables satisfy client requirements, cost and schedule.
  - Work closely with Director of Employee Benefits Division, Benefits Service Manager and Director of Operations to obtain necessary resources to support the team's requirements, discuss project impediments, and to escalate issues which cannot be resolved by the team.

- Prepare quarterly production and activity reports.

- Ensure good file maintenance with documentation of account issues and maintenance of the Agency Management System.
- Establish and consistently maintain effective and positive working relationships with Associates and clients.

## Education and/or Experience

- A minimum of seven to ten years experience servicing large client group (50+ lives) health and benefit products.
- Bachelor degree strongly preferred.
- Professional history must show increasing levels responsibility directly related to the performance of the above duties.
- Strong familiarity with the Employee Benefits marketplace to include unique business industry needs, educational and professional development associations, carriers, and other broker agencies.
- Current technical knowledge and understanding of Employee Benefit federal and state legislation.
- Ability to make independent decisions and use good judgment in addressing and servicing client needs.
- Strong communication skills with the ability to provide non-technical explanations to technical matters, and summarize and present information in a clear, concise and accurate written and verbal format.
- Maintain a valid unrestricted Life and Disability License in California and meet the continuing education requirements.  If involved in the sale of Long Term Care, the individual must maintain the proper certification through continuing education.
- Maintain a valid California driver's license and dependable transportation.
- Must have knowledge of personal computing with the ability and willingness to learn and use all computer programs as required.

## Work Environment and Physical Demands:

- Ability to use computer keyboard and sit in a stationary position for extended periods as well as the use of office equipment such as fax and copy machines, and telephones.  Work is performed in a typical interior/office work environment.
- Travel to client sites is required.  Usually travel is within driving distance, but may occasionally consist of 2 – 5 night stay out of town
- Extended work hours (10 – 12 hrs/day) required on occasion to attend and participate in networking and industry functions that begin before the workday, and may extend into the evening.