

**Position Title:** Relationship Account Manager  
**Company:** NueSynergy  
**Reports to:** Kelly Spencer  
**Position Classification:** Full-time, Non-Exempt  
**HIPAA Training:**  Level 1       Level 2

### **Position Summary:**

A Relationship Account Manager oversees all aspects of relationships with assigned clients(HR/Employers). Providing enrollment support on Consumer Driven Health products through phone, email, and conference call channels. Develop and maintain strong relationships with decision-makers and centers of influence at our clients, while also identifying cross-sale solution opportunities. The primary role of Relationship Account Managers is to ensure our client's satisfaction while striving for a retention rate of 90% or above.

### **Responsibilities:**

- Carry out the marketing plan as developed at each client's workplace in adherence to Agency practices, procedures and policies.
- Maintain professional advisory and consultative relationships with assigned accounts
- Promote growth of accounts through benefit fairs and participation in other public relations functions.
- Improve and foster excellent relationship with group's key personnel.
- Consult with employees on product design and benefits.
- Consult, present and enroll employees in flexible benefit products and document conversations and decisions with each employee through the appropriate systems.
- Build relationships with existing clients and look for opportunities to increase enrollment
- Maintain and develop knowledge of all flexible benefits products that you are involved in.
- Serve as a back-up when needed for the operations and customer service departments
- Manage all open enrollment functions for your designated clients: Process renewal paperwork, collection of enrollment forms, issue welcome kits, etc.
- Draft and issue plan documents and amendments when needed
- Correspond quarterly with each of your group contacts to satisfaction with NueSynergy services and address any future needs

### **Expectations:**

- Foster morale, pride and team spirit among other employees and show respect for co-workers at all times.
- Participate in community affairs.
- Cultivate and maintain and image of respect with all competitors.
- Identify competitors' strengths and weaknesses.
- Stay aware and seek out resources to enhance sales skills
- Maintain and improve professional product knowledge, markets, rules, regulations and other industry issues.
- Recommend possible gains in efficiencies in operations and sales.
- Refer appropriate prospects to other agency departments for cross-selling opportunities.
- Maintain a professional image and conduct at all times.
- Remain calm in all situations
- Act with integrity and maintain honest communications with customers and fellow employees

**Qualifications:**

<b>Education</b>	High School education required (College experience or degree preferred)
<b>Knowledge</b>	Understanding of Consumer Driven Healthcare products (HSA/FSA/HRA/COBRA/Etc.) preferred.
<b>Skills</b>	<ul style="list-style-type: none"> <li>· Demonstrated advisory skills and ability to deal well with people.</li> <li>· High level of organizational ability.</li> <li>· Excellent communication skills</li> <li>· Friendly, positive and approachable demeanor</li> <li>· Strong and responsive listening skills</li> <li>· Ability to adapt within and to varying work environments or client locations</li> <li>· Ability to adhere to privacy and confidentiality expectations</li> </ul>
<b>Technical Skills</b>	Proficiency with computers, Microsoft Office including Word and Excel, with strong typing skills. Ability to learn and effectively navigate multiple systems and applications efficiently. Strong analytical and problem-solving skills.
<b>Work Schedule</b>	Full-time, non-exempt position. Must be able to work within the standard 40 operating hours of Monday - Friday, between 7:30 a.m. - 7 p.m. CST. Must maintain 100% attendance for the first 90 days.
<b>Status</b>	Legal right to work in the United States

**Thank you for your interest in NueSynergy!**

Please email all resumes to [HR@nuesynergy.com](mailto:HR@nuesynergy.com)