Onboarding Account Manager
Advanced Level | Account Management | Leads onboarding and delivers a consistent, accurate client launch experience

Position Summary

The Onboarding Account Manager serves as the client's guide through onboarding, coordinating internal teams responsible for system configuration and setup to ensure a seamless experience. This role owns the onboarding experience for new clients and existing client expansions, ensuring accurate setup and a smooth transition into ongoing account management — contributing to our Service Advantage through precision, consistency, and reliability from day one.

This role operates in a detail-intensive, deadline-driven environment, managing multiple implementations simultaneously while coordinating across internal teams and stakeholders.

Success in this role requires the ability to manage complex onboarding processes, maintain a high level of accuracy, coordinate effectively across stakeholders, and execute onboarding and launch activities with discipline and consistency.

Core Responsibilities

- Serve as primary point of contact for clients during onboarding and implementation
- Lead onboarding from kickoff through system configuration and readiness
- Guide clients through the onboarding process, providing clarity on requirements, timelines, and next steps
- Maintain regular communication with clients, ensuring alignment and progress throughout implementation
- Maintain complete and accurate implementation documentation and records in CRM
- Monitor implementation pipeline and manage assigned workload within defined service levels (SLAs)

Implementation Coordination & Oversight

- Coordinate with internal teams responsible for system configuration, plan builds, eligibility setup, and enrollment processing
- Ensure all implementation tasks are coordinated, completed accurately, and delivered within established timelines
- Validate that client requirements and plan designs are accurately reflected in system configuration
- Identify gaps, discrepancies, or risks in set-up and work with internal teams to resolve them
- Track progress against implementation milestones and proactively address delays or issues

Launch Support (0–60 Days Post-Go-Live)

- Serve as primary contact during launch stabilization
- Monitor early client and participant activity to identify and resolve onboarding-related issues
- Ensure a smooth, consistent transition from implementation to ongoing account management

Client Transition

- Conduct structured handoff to Account Management
- Provide full client context, including set-up details, risks, and considerations
- Confirm client readiness for transition and ongoing support

Additional Responsibilities

- Support internal teams with implementation-related questions or escalations as needed
- Identify opportunities to improve onboarding processes and reduce errors
- Adhere to all company policies, procedures, and service standards

Success Metrics

Performance in this role is measured by:

- **Implementation Cycle Time:** Timely progression from kickoff through go-live readiness, aligned to defined onboarding timelines and adjusted for client and internal dependencies
- **Milestone Adherence:** Consistent achievement of key implementation milestones, including client onboarding, data readiness, and launch preparation
- **Quality & Accuracy:** Clear documentation, accurate translation of client requirements, and minimal rework or post-launch corrections
- **Client Experience:** Professional, proactive communication and a smooth, well-guided onboarding and launch experience, as measured through client feedback and post-implementation satisfaction surveys
- **Consistency:** Reliable execution, follow-through, and attention to detail across multiple implementations
- **Launch Success:** Stable client transition with minimal post-implementation issues, gaps, or escalations

Competency Expectations

At this level, success looks like:

- Demonstrates strong attention to detail and accuracy in all onboarding and coordination activities
- Applies critical thinking to identify gaps, risks, and discrepancies in implementation progress
- Communicates clearly and confidently with clients and internal teams

- Guides clients effectively through onboarding, setting expectations and maintaining alignment
- Manages multiple implementations and priorities in a structured, organized manner
- Coordinates effectively across teams—without direct ownership of execution—to ensure accurate and timely outcomes
- Demonstrates strong product knowledge and applies it to support client onboarding needs
- Proactively identifies risks and works to resolve them
- Demonstrates consistency, ownership, and accountability in execution

Work Environment & Compliance

- Ability to manage multiple concurrent onboarding and implementation processes in a structured, deadline-driven environment
- Ability to remain engaged at a workstation while coordinating client communication, internal activities, and implementation progress
- Frequent interaction with internal teams to align on timelines, deliverables, and client needs
- Adherence to all company policies, including data privacy and security standards (HIPAA compliance required)

Minimum Job Requirements

Education:	High school education or equivalent required
Experience:	3–5 years of account management, onboarding, implementation coordination, or related experience
Technical Skills:	Proficiency in Microsoft Office (Word, Excel, etc.), with strong typing skills. Ability to learn and effectively navigate multiple systems and applications efficiently. Strong organizational, critical thinking, and multitasking abilities
Core Skills:	Communication, organization, attention to detail, problem solving, time management, relationship building, and coordination across teams
Skills Test:	Customer Service Aptitude Profile, Employee Personality Profile and Computer Literacy
Licensing	Not Applicable
Status:	Legal right to work in the United States

HIPAA

This position requires access to and handling of personally identifiable information (PII) and protected health information (PHI). Candidates must complete required training and comply with the company's Security and Privacy Rule policies.