

## Job Description and Responsibilities

Position Title: Relationship Account Manager

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### **PRIMARY FUNCTIONS:**

- Serve as the primary contact for all employer client decision makers.
- Oversee all aspects of relationship with assigned clients
- Educate and provide enrollment support on Flexible benefits products.
- Identify cross-sale opportunities with our clients
- Develop and maintain strong relationships with decision makers and centers of influence at our clients.
- Ensure client satisfaction and meet retention goal of 98% for your client group

### **MAJOR RESPONSIBILITIES**

- Maintain professional advisory and consultative relationships with assigned accounts
- 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
  - Renewal paperwork
  - Collection of enrollment forms
  - Issue Welcome kits
- 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

### **OTHER RESPONSIBILITIES**

- Cultivate and maintain and image of respect with all competitors.
- Maintain and improve professional product knowledge, markets, rules, regulations and other industry issues.
- Recommend possible gains in efficiencies in operations and sales.
- 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**

- Understanding of products in the Flexible Benefits industry to include HSA/FSA/HRA/COBRA is a plus.
- Demonstrated advisory skills and ability to deal well with people.
- High level of organizational ability.
- Excellent communication skills
- Friendly, positive and approachable demeanor
- Strong and responsive listening skills
- Ability to adapt within and to varying work environments or client locations
- Ability to adhere to privacy and confidentiality expectations