JOB DESCRIPTION

Title: Senior Account Manager and Department Supervisor	**Employment Status:** Full-time
Department: Employee Benefits; Service	**FLSA Status:** Exempt
Location: **Omaha**	

POSITION SUMMARY

The Employee Benefits Senior Account Manager and Department Supervisor is responsible for leading the service team within their division while also serving as a Senior Account Manager for a book of business. As a leader, this role is responsible to oversee all aspects of the team's work from hiring and training to performance management and day to day operations. The goal is to ensure the department operates as efficiently as possible while servicing their clients.

The ideal candidate will have a background in employee benefit account management with a passion to share knowledge and develop a team to deliver exceptional service to our clients and to each other.

North Risk Partners is a fast-growing firm dedicated to serving the insurance and risk management needs of businesses and individuals. Our team consists of over 400 employees working in over 30 locations across five states, including Minnesota, Iowa, North Dakota, South Dakota, and Nebraska. North Risk's team is values-driven with a common mission of service to our clients, each other, and our community.

PRIMARY RESPONSIBILITIES

Leader:

- Ensure business goals, deadlines and performance standards are communicated
- Work closely with other department leaders across the organization to determine standards for the service team
- Work closely with account managers to carry out efficient processes and procedures to ensure excellent service to North Risk Partners clients.
- In partnership with Employee Relations to hire, onboard, and train new hires to ensure they understand their roles and continue to learn and develop within their role, the team, and the organization.
- Provide ongoing performance feedback to employees through monthly one on one meetings and annual performance reviews.
- Partner with Employee Relations for performance improvement and employee development as needed.

- Provide industry updates, advancements, and trends for team members to stay abreast and keep knowledge current
- Perform administrative duties including, but not limited to, approving timesheets and PTO requests and monthly expense reports; ensuring employees are compliant with appropriate paperwork and licensing, etc.
- Set goals for employees to ensure deliverables are met within organizational timelines and expectations
- Provide ongoing coaching and performance management feedback for employees; including but not limited to facilitating monthly one on one meetings

Account Manager:

- Develop and maintain strong relationships with clients through advising and responding to all correspondence in a quick and accurate manner. This includes answering questions regarding all lines of coverage, and assisting with plan and/or carrier changes, claims, and billing.
- Collaborate with Risk Advisors to determine and meet client goals
- Support Risk Advisors by exercising independent judgment and discretion to:
  - Analyze markets for competitive pricing and develop insurance solutions for current clients
  - Analyze and offer guidance on alternatives and strategies
  - Analyze quotes from carriers for accuracy
  - Review policy contracts to be certain information and coverages are accurate
  - Evaluate and prepare renewal comparisons and policy proposals
  - Present renewal comparisons and policy proposals as needed
  - Communicate and educate clients on policy changes as needed
  - Resolve inquiries on service concerns and problems to ensure client satisfaction
  - Coordinate external (i.e., carriers) and internal (i.e., agency software systems) implementation of new groups as necessary
  - Coordinate the implementation or renewal changes with the carriers and any other third party vendors
  - Market new or review business when necessary and
  - Review and analyze client claims data for determining future plan design and pricing for both fully insured and self-funded plans.
- Schedule and participate in client meetings as necessary
- Study trends and advancements in the employee benefits field, as well as changes to regulatory climate for businesses and the insurance industry overall to keep knowledge current and plan strategically
- Promote value-added services available through North Risk Partners
- Refer business across all departments (i.e., property and casualty, employee benefits, and personal lines)
- Develop and maintain positive and effective relationships with partner insurance carriers
- Enter activity and other relevant information in to agency management systems and other software tools according to company procedures
- Follow all federal and state regulations, and best practices for avoiding errors and omissions
- Mentor new employees by guiding them on North Risk Partners service methods and mission
- Attend and actively participate in agency service training meetings
- Continue professional development pursue and maintain professional designations if applicable

- Travel as necessary for client meetings

SECONDARY RESPONSIBILITIES

Perform miscellaneous projects and complete various tasks as requested by management.

JOB SPECIFICATIONS

Education, Experience, and Certifications

- A minimum of five (5) years of relevant experience
- Bachelor's Degree is preferred, but not required
- High competence in Microsoft Office required. (Experience with Microsoft Teams is highly preferred.)
- Experience with account management and electronic filing systems is required.

BEHAVIOR EXPECTATIONS

- A role model for North Risk Partners' core values, mission, and desired culture
- Demonstrate enthusiasm, positive attitude, and a strong understanding of the fundamentals of customer service
- A self-starter who takes initiative to identify problems and lead by example
- Excellent oral and written communication skills
- Strong attention to detail with a strong ability to plan and organize accordingly
- Professionally and positively represent North Risk Partners to all coworkers, clients, and external stakeholders
- A professional who collaborates and demonstrates the ability to carry on a conversation with clients, Risk Advisors, and other coworkers within North Risk Partners and is a team player who works well with others
- Ability to analyze and solve problems
- Able to work independently with minimal supervision in a fast-paced environment
- A role model for North Risk Partners' core values, mission and desired culture

PHYSICAL REQUIREMENTS

- Perform under normal office conditions; may include lifting/carrying objects weighing up to 25 pounds
- Twist, bend, stoop, kneel, squat, stand, walk, and reach frequently
- Hear, speak, and effectively verbally communicate in the English language, including following oral and written instructions in order to communicate with people inside and outside of the organization
- Sit at a desk for extended periods of time and perform long hours of work sitting at a computer
- Move around office/building/facilities repeatedly throughout the day
- Apply manual dexterity, visual acuity and ability, for computer keyboarding, office equipment uses, review of detailed reports, information, fine print, and warning labels

- Must possess valid driver's license and be able to travel to different North Risk Partners locations for meetings, as well as various locations throughout the state and potentially the region for client meetings
- Able to work a flexible work schedule, including overtime, nights, and weekends to attend events and meetings as needed

TOOLS AND EQUIPMENT USED

Incumbent must be able to use telephone, calculator, copy machines, computers, printers, and other office equipment.

WORK ENVIRONMENT

The work environment is primarily indoors. Exposure to a variety of weather conditions during work related travel and events held outside of the workplace will occur and I acknowledge that I have read, understood, and agree with the contents of this position description. I agree to use my best efforts to fulfill all expectations of the position. I also acknowledge that I am an at-will employee.

This job description does not necessarily list all the job functions or accountabilities of the job. Employees may be asked by management to perform additional duties and tasks. Management reserves the right to revise and update job descriptions at any time.

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Employee Signature Date