



Benefits Client Services Specialist I

Job Summary

The Client Services Specialist supports the Client Managers and Client Executives through various tasks. With a passion for customer service and teamwork, this individual combines their friendly demeanor with stellar organization skills and detail-oriented focus to administer and support commercial insurance policies for various clients in a fast-paced environment.

Responsibilities

- ▶ Responsible for day-to-day internal, client, and carrier communications, problem-solving, and compliance on client accounts.
- ▶ Support the marketing process by compiling documents, collecting data, and gathering carrier quotes as requested by the Risk Advisor and Client Manager/ Client Executive.
- ▶ Support team members in timely handling of phone and email communications during team member absences and busy work periods.
- ▶ Assist Client Managers, Client Executives, and Advisors by facilitating the renewal process for clients.
- ▶ Partner with insurance carriers to ensure accurate coverage throughout the year, with greater emphasis during the renewal process.
- ▶ Maintain thorough, accurate, and up-to-date records in our Agency Management System and other internal and client-facing systems.
- ▶ Work closely with the team to maintain continuous knowledge of client accounts to identify potential issues and opportunities.
- ▶ Stay informed of carrier changes, industry developments, and government regulations surrounding group benefits insurance.
- ▶ Provide regular two-way communication between the client and team, providing strong team representation and client expectations.
- ▶ Understand company capabilities and services and effectively communicate all offerings to the client.

Education & Experience

- ▶ Education: High school diploma or GED required; bachelor or associate degree preferred
- ▶ Experience: At least one year of experience in a client-focused role. Experience with group benefits is preferred.
- ▶ Licensure: Current Nebraska Life & Health insurance license, or willingness and ability to obtain within 90 days of employment.

Knowledge & Skills

- ▶ Demonstrate exceptional communication skills, both verbal and written, with the ability to successfully interact with various client personalities at all levels within an organization.
- ▶ Manage numerous projects simultaneously while paying strict attention to detail.
- ▶ Stay organized and reprioritize tasks in an ever-changing environment.
- ▶ Exhibit excellent customer service skills and a desire to problem solve.
- ▶ Aspire to be independently resourceful but not afraid to ask questions within our supportive team environment.
- ▶ Utilize time management skills with the ability to remain focused on deadlines.
- ▶ Understand insurance documents to administer policies within quoting tools and online enrollment systems.
- ▶ Proficient in Microsoft Excel, PowerPoint, Outlook, and other software, systems, and programs, with the ability to learn new software applications.

Physical Demands

- ▶ This role's physical exertion is sedentary and occurs in an office environment.
- ▶ Exerting up to 10 pounds of force occasionally and a negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects.
- ▶ Substantial movements and repetitive motion of the wrists, hands, and fingers.
- ▶ Individuals must have close visual acuity to perform activities such as preparing and analyzing data and figures transcribing, viewing a computer, and extensive reading.

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