JOB DESCRIPTION

Job Title: Corporate Benefits Advisor
Reports to: President, Chief Executive Officer (Sales Manager)

POSITION SUMMARY

The Corporate Benefits Advisor/Broker will help drive sales of Clark & Lavey's products in the marketplace and manage client relationships. The incumbent will be assigned a sales quota and achieve success by prospecting/identifying client leads and/or retain current clients by selling benefits solutions and value-added services to customers. A competitive compensation structure is included.

DUTIES AND RESPONSIBILITIES

- Achieves annual sales quota for new and retention business.
- Optimizes customer satisfaction for assigned accounts.
- Maintains an assigned, existing book of business plus identifies/develops additional opportunities for revenue growth.
- Works collaboratively with the Client Services team to continually improve business performance and deliver unparalleled customer service.
- Creates a competitive advantage throughout the lifecycle of the customer's affiliation with Clark & Lavey. Strives to build and cultivate relationships client and prospective client companies.
- Conducts the pre-renewal, proposal delivery, and open enrollment meetings.
- Applies strong knowledge of all lines of coverage and options to develop a strategic plan to provide optimal solutions to achieve client objectives.
- Negotiates with carriers regarding rates, plan details and rate guarantees on a client specific basis. Must possess knowledge of state issues, client market size, evaluation of carrier policies, procedures and recognizing opportunities to obtain the best possible rate and contractual provisions for Clark & Lavey clients.
- Recognizes, communicates, and follows-up on items that require escalation and communication to appropriate parties.
- Strictly adheres to all Clark & Lavey policies and procedures.
- Participates in carrier functions to improve knowledge and operational efficiencies.
- Attends development seminars, webinars and lectures to enhance professional and personal development.
- Performs other duties as assigned.

COMPETENCIES

- Must possess extensive knowledge with employee benefits, healthcare and the Affordable Care Act.
- Strong communication and presentation skills.
- Maintains strict confidentiality and exercises the utmost discretion with clients, claims data and HIPAA regulations.

EXPERIENCE AND QUALIFICATIONS

- B.S. or B.A. in Business Administration (preferred)
- Minimum of 4-6 years' experience producing external sales and achieving all sales targets; preferably in the employee benefits industry or human resources related field.
- Licenses: Life, Accident and Health License Required
- Strong PC skills; must be capable of using Microsoft Suite Office Products (Outlook, Excel, Word) seamlessly; additionally, has to navigate within a local area network, our CRM (Salesforce), carriers' and vendors' websites and database systems.