



INNOVATION IN BENEFITS

## JOB POSTING

<b>POSITION:</b>	Account Manager
<b>LOCATION:</b>	North Carolina (Charlotte area)
<b>DEPARTMENT:</b>	Consulting
<b>STATUS:</b>	Full-Time, Exempt

The primary role of an Account Manager is to exercise discretion and independent judgment in the assumption of overall responsibility for client relationship management and the management of the account servicing team. Work has a significant impact on client satisfaction, retention, and company revenues.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include, but are not limited to, the following:

- Assist in developing long-term key account strategies
- Work with the Producer to develop and maintain courteous and effective working relationships with clients, vendors and other representatives of external organizations
- Evaluate and provide Trion principals with input on all issues impacting revenue generation
- Identify prospective clients and network with centers of influence
- Provide strategic consulting services to clients by conducting client meetings and presentations, identifying client objectives and providing advice and recommendations to clients concerning health and welfare benefits plans and design changes to achieve client objectives
- Respond timely and effectively to client complaints and concerns regarding account management
- Manage and coordinate client service team to achieve client goals and Trion business objectives
- Supervise the performance of client service team members to meet day-to-day client needs, providing overall direction, coordination and evaluation of these employees
- Responsible for human resource issues and practices for direct reports, including, but not limited to, interviewing, selecting, training, managing, reviewing performance, providing feedback and job performance evaluations as appropriate
- Address and attempt to resolve complaints and concerns of directly reporting staff employees, and make disciplinary decisions concerning those employees, including but not limited to hiring and firing decisions in consultation with the human resources department
- Coordinate all underwriting & marketing efforts with Underwriters

### REQUIRED QUALIFICATIONS:

- Bachelor's degree strongly preferred, but not required
- Account Management experience in Benefits Brokerage/Insurance industry
- Prior management experience, both direct and matrix, is preferred
- Effective analytical, math and problem solving skills, sound judgment, strong decision making ability, confidence to make difficult decisions and excellent communication skills
- Must be organized, detail oriented and able to translate big picture ideas into client objectives
- Knowledge and ability to apply effective management and certain marketing techniques
- Ability to speak effectively before groups
- Ability to define problems, collect data, establish facts and draw valid conclusions
- Must have computer skills proficiency and experience with MS Office suite (including Word, Excel, and PowerPoint)

### WORKING CONDITIONS

The work is typically in normal office environment, either on-site at Trion or at various customer locations. Some travel is required.