

## **The Mahoney Group Account Manager Benefits**

**Job Title:** Account Manager  
**Department:** Benefits  
**Reports To:** Office Manager  
**FLSA Status:** Exempt

### **Summary:**

This position supports the Producer on specified accounts and may provide relevant insurance advice to new and existing clients. As a representative of the Agency the Account Manager must maintain a positive, professional image as well as exemplify the agency's standards for client service and retention. The Account Manager must have a full understanding of Employee Benefit products and services offered by the Agency. This position includes responsibility for developing long-term relationships as well as providing ongoing support and service to existing clients.

### **Essential Duties and Responsibilities:**

- Address all requests from clients/prospect in regards to the purchase of a proposed policy or coverage.
- Meet with clients and new business prospects to deliver proposals, new and renewal policies, explain coverages, and suggest additions or changes in the insurance program.
- Analyze information, problems and situations to recognize alternatives and their implications.
- Respond to customer inquiries in a timely manner.
- Support Producer as needed.
- Complete and review applications and policies to identify and target new business lines for existing insured clients and make recommendations on account rounding as appropriate
- Assist clients to resolve insurance claim issues.
- Work as part of a team to collaborate with colleagues.
- Follow agency Standard of Excellence and Best Practices.
- Develops and maintains good relationships with insurance company representatives and clients to facilitate retention of business.
- Performs or assists with the marketing and quotation process for new and existing business.
- Meets Company defined production goals, both new business and retention.
- Has knowledge and understanding of the HIPAA/HITECH information privacy and security laws. Follows the HIPAA privacy and security rules.

### **Supervisory Responsibilities:**

This job has no supervisory responsibilities.

### **Certificates, Licenses, Registrations:**

State-specific insurance license as required by law. Beneficial: RHU, CEBS or other insurance professional designations.

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### **Computer Skills:**

In depth knowledge of Microsoft Office products such as Outlook, Word, Excel, and Power Point.

### **Education and/or Experience:**

Substantial industry related experience in Employee Benefits with an emphasis on self-funded programs. Some college preferred.

### **Language Skills:**

Ability to read and interpret documents such as policy forms, manuals and contracts. Proficiency in writing business reports and correspondence in addition to communicating effectively including presentations to groups.

### **Mathematical Skills:**

Mid-level arithmetic including ratios and percentages.

### **Physical Demands:**

While performing the duties of this Job, the employee is regularly required to sit; use hands to finger, handle, or feel and talk or hear. The employee is frequently required to reach with hands and arms. The employee is occasionally required to stand, walk or stoop. The employee must rarely kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision.

### **Self Management skills:**

High level of decision making, problem solving, prioritizing, and follow through under limited supervision. Ability to accept ambiguous circumstances and take action where answers to a problem are not readily apparent.

### **Qualifications:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Other Skills and Abilities:**

Experience in Agency Management System and a paperless work environment a plus.

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### Competencies:

#### Self-Management:

Demonstrate self-control and an ability to manage time and priorities.

#### Customer Service:

Anticipate, meet and/or exceed customer needs, wants and expectations.

#### Interpersonal Skills:

Effectively communicate, build rapport and relate well to clients and associates.

#### Continuous Learning:

Take initiative in learning and implementing new concepts, technologies and/or methods.

#### Planning/Organizing:

Utilize logical, systematic and orderly procedures to meet objectives.

#### Goal Orientation:

Energetically focus efforts on meeting a goal, mission or objective.

#### Written and Oral Communication:

Able to convey complex ideas clearly, succinctly and understandably.

We are an equal employment opportunity employer.

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