

Position Description

JOB TITLE:	Account Manager
DEPARTMENT:	Group
LOCATION:	Independence, OH
REPORTS TO:	Wellness IQ Management
FLSA STATUS:	Exempt
Revision: ■	May 2021

Position Summary: This position is responsible for managing new and existing client relations and driving engagement within the program. It requires a focus on project management of client customization and integration of services to ensure a smooth implementation, relationship building throughout the life of the client and client satisfaction.

MAJOR RESPONSIBILITIES:

- Overall responsibility for the account, works with sales, brokers, consultants, and internal team through the implementation for all new accounts. Fully understands and communicates client expectations and background to ensure success launch of the WellnessIQ programs.
- Participate in implementation kick off calls and ongoing project meetings with clients' stakeholders. Prepare and coordinates formal presentations to clients, consultants, brokers, members and producers regarding product, plan design, member education, service results, and renewals. This requires traveling to client locations.
- Establish working relationship with client point-of-contact; develops and oversees the account service strategy, including regularly scheduled meetings as agreed upon by the client. Prepare agendas, minutes, deliverable tracking and other project documentation to communicate progress internally and externally.
- Organizes and oversee client site visits, screenings and health fairs as necessary.
- Take ownership for service issues on behalf of client point-of-contact, work with service partners to resolve problems. Communicates status of on-going service issues to the client point-of-contact in a timely manner.
- Responsible for preparing proposals for system enhancements that may arise outside of the initial implementation. Enhancements need to be proposed to a change forum, tracked and managed while keeping client informed of progress and expected timelines
- Provide client point-of contact support on benefit design changes, legislative developments and compliance requirements
- Oversee client management reporting. Position, deliver and communicate client management data to client and Producer, including but not limited to Activity Reports, Quarterly Reports and financial performance guarantee
- Capitalize on all new revenue opportunities for existing clients by developing and executing a successful client management strategy. This should be coordinated with the Sales Consultant if needed
- Deliver and manage client renewals to consultants, brokers, and client to ensure client management retention, profitability, revenue and satisfaction objectives that are consistent with company goals
- Follows current HIPAA/HITECH guidelines and procedures as described in the WellnessIQ's Policy Manual

- Maintains security of transmission or receipt of all emails, files, documents, reports, etc. relayed via computer, cell phones or other devices, that may contain PHI, as described in the WellnessIQ Policy Manual
- Have an understanding of health insurance and related benefits

JOB REQUIREMENTS & QUALIFICATIONS:

EDUCATION & EXPERIENCE

- BA or BS College Degree preferred
- Health and Wellness or related experience, or any combination of education, experience and training that provides knowledge and abilities to perform the job
- Account Management experience preferred
- Project Management experience

SPECIAL SKILLS REQUIRED:

- Excellent communication skills
- Strong typing skills
- Strong organization, communication and problem-solving skills
- Strong analytical and data management
- Ability to work both independently and in a collaborative manner in a rapidly changing environment
- Ability to handle multiple priorities in a fast paced work environment
- Customer focused and responsive
- Flexible regarding daily work assignments
- Self-starter with the ability to achieve results independently as well as in a team environment
- Highly motivated and energetic professional who enjoys working in an entrepreneurial, fast-growing environment
- Excellent interpersonal and organization skills
- Ability to respond professionally and accurately to requests received from a variety of clients
- Ability to travel as needed

COMPUTER SKILLS:

- To perform this job successfully, individual should have knowledge of Microsoft Word, Microsoft Excel spreadsheet, Microsoft Access, Power Point design software, and Salesforce.com experience preferred.

SUPERVISORY RESPONSIBILITIES: None

CERTIFICATES, LICENSES, REGISTRATION: None

PHYSICAL DEMAND: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Ability to sit at a computer for long periods of time and use a telephone frequently
- Standing, walking, talking, hearing, sitting, reaching
- Lifting up to 25 lbs. occasionally; lifting up to 10 lbs. regularly



WORKING CONDITIONS: Climate controlled open office environment. Travel to client offices and work locations. More travel during periods of heavy activity, such as new client onboarding.

NOTE: *The information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.*

Employee's Signature

Date

Manager's Signature

Date