

## Account Manager – Employee Benefits

### ROLE OVERVIEW

Employee Benefits Account Managers are responsible for delivering high-quality client service, managing retention, and supporting the growth of an assigned book of benefits business. This role serves as the primary point of contact for clients and works closely with producers, carriers, and internal teams to ensure client needs are met with professionalism, accuracy, and proactive communication.

Employee Benefits Account Managers are expected to take ownership of their accounts, anticipate client needs, and provide thoughtful, consultative support. CAI's culture is grounded in Clarity, Accountability, Resilience, Engagement, and Strategy, and Account Managers are expected to reflect these attributes in how they manage client relationships, collaborate with teammates, and approach their work.

### CORE RESPONSIBILITIES

- Manage and service an assigned employee benefits book of business, including clients with varying funding methods and plan designs.
- Build and maintain strong, trust-based relationships with clients, producers, carriers, vendors, and internal team members.
- Analyze, market, and recommend employee benefit solutions aligned to client objectives and workforce needs.
- Lead renewal and new business processes by preparing RFPs and securing competitive carrier and vendor proposals.
- Evaluate and negotiate carrier and vendor quotes and contracts on behalf of clients.
- Prepare clear, accurate proposals and presentation materials to support informed client decision-making.
- Educate and advise clients through mid-year reviews, renewal meetings, and employee open enrollment meetings.
- Manage benefit implementations, plan changes, and open enrollment processes from start to finish.
- Provide elevated support for claims, eligibility, billing, and other benefit-related service issues.
- Promote growth of the existing book of business through thoughtful account rounding and proactive benefit discussions.

- Maintain a strong working knowledge of carrier and vendor underwriting guidelines, products, market trends, and compliance considerations.
- Maintain a functional working knowledge of Employee Navigator to support benefit enrollments, eligibility updates, and accurate client data management.
- Ensure client files are complete, accurate, and well-documented in accordance with agency standards.
- Contribute to the overall success of the team by sharing knowledge, supporting colleagues, and taking on additional responsibilities or special projects as needed.

### SKILLS & QUALIFICATIONS

- Client-focused with a strong sense of accountability for service quality and retention.
- Proven ability to manage a book of business independently with accuracy and attention to detail.
- Strong analytical, problem-solving, and critical thinking skills.
- Highly organized with the ability to manage multiple priorities and deadlines.
- Clear, professional communicator with strong written and verbal skills.
- Sound judgment and the ability to work independently while collaborating effectively with others.

### REQUIREMENTS

- Active Health & Life License
- 2 Years of Account Management Experience

### CAI CULTURE & EXPECTATIONS

At CAI, how we show up matters. Employee Benefits Account Managers are expected to act with integrity, accountability, and professionalism while delivering a high-quality client experience. This role requires a collaborative mindset, respect for others, openness to feedback, and a commitment to providing clarity and confidence to clients, producers, and colleagues.