

Account Executive

The Account Executive is an essential role that is responsible for client implementation and retention.

This position requires an experienced individual with prior account management experience as it relates to Group Health Plans. This position will work with all operational departments within PBA to ensure a great client experience. This position is also outward facing and reports to the Director of Client Accounts. Please see below for a more in-depth overview of daily responsibilities and skills required for this position.

Skills required for this position:

- Must be able to maintain a positive work atmosphere by behaving and communicating in a manner so that you get along with peers, subordinates, clients, vendors, and management.
- Must be a self-starter who is organized and able to handle multiple projects and due dates.
- Good problem solving and research skills.
- Proficient in Microsoft Office Suite products.
- Strong presentation and communication skills to large and small audience.
- Good understanding of benefit plans and government regulations, i.e., HIPAA, COBRA, ERISA, ADA, etc.

Responsible for:

- Oversee transition of new clients from prior administrator to PBA. Obtain all information related to company benefit plans and distribute to various departments as needed. Complete all external vendor set up paperwork.
- Complete internal documentation and participate in internal and external transition meetings as needed.
- Facilitate ongoing vendor file changes.
- Process requests for plan changes and group terminations. Distribute information to various departments as needed.
- Act as a primary contact for broker contacts.
- Liaison between PBA departments with clients, brokers, and vendors.
- Attend meetings, including, but not limited to:
 - Prospective clients
 - Current clients
 - Brokers
 - Employee open enrollment/re-enrollment
 - Health fairs
- Oversee broker and client monthly reporting including set up of initial reports and responding to requests for additional monthly reports.
- Assist brokers and clients with ad hoc report requests.
- Performing other duties as assigned to support PBA's Mission, Vision and Core Values

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Why work for PBA?

- STRONG work life balance (37.5 Hour Work Week – 7.5 Hour Day)
- Flexible Hours
- Remote work environment
- Great company culture
- Company sponsored employee events
- PTO earned after 3 months!
- Holiday Pay
- Medical Insurance
- Dental Insurance
- Vision Insurance
- Life Insurance
- Short-Term Disability
- Flexible Benefit Plan
- 401K with company match
- Direct Deposit
- Growth potential
- Competitive pay
- Company issued laptop

Support PBA's CORE values:

- Work together and respect each other
- Be Dedicated to the customer
- Be accountable and do what you say
- Take initiative and be willing to learn
- Generate positive energy

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Work Environment

- This role routinely uses standard office equipment such as computers, phones, filing mechanisms, and photocopiers. Essential office equipment will be provided to perform the job duties remotely.

Physical Demands

- This is both a sedentary and active role which requires the ability to sit for long periods of time, and actively travel to destinations to meet with clients.
- Must be able to lift at least 10-15 pounds to transport materials to client meetings and benefit fairs.
- The person in this position constantly operates a computer and other office machinery, such as a calculator, copy machine, and computer printer.
- To perform the physical requirements of the position, the employee must be able to: possess manual dexterity in his or her hands in order to keyboard; see; hear, talk, walk; sit; stand; report to work and stay at work for regularly scheduled work shifts and occasional overtime; communicate clearly, cooperatively, and professionally with co-workers, supervisors, clients, and outside vendors; and maintain professional relationships with co-workers, supervisors, clients, and outside vendors.

Essential Functions Statement

Although we will allow some flexible scheduling including work from home several days per week as set forth below, this position requires regular daily interaction with co-workers, clients, vendors, and contacts and has been traditionally an in-office, outward-facing customer service position. So, while we will create the following work parameters to reflect the realities of today's workplace and employees, we are unwilling to sacrifice or compromise on the required and expected quality and quantity of daily interaction and service associated with this position.

- The person in this position will work in the office at least 2 times per month. The other days can be worked either in the office or remotely.
- The person in this position is regularly required to travel and must have the ability to drive a motor vehicle to travel to local and non-local territory.
- The person in this position frequently communicates with co-workers, customers and vendors via phone and email, and must be able to exchange accurate information in these situations.
- The person in this position must demonstrate strong attention to detail to be able to properly maintain various reports and documentation, and coordinate system set ups and networks.
- The person in this position must have strong communication and organization skills to maintain files and relationships of various vendors and clients.

If these standards can be met virtually and at-home as we expect, these parameters will remain in place, but if not, they are subject to change.

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Professional Benefit Administrators is an equal opportunity employer. In accordance with anti-discrimination law, it is the purpose of this policy to effectuate these principles and mandates. Professional Benefit Administrators affords equal employment opportunities to all employees and applicants and specifically prohibits any and all discrimination and harassment based on race, race-related traits, color, religion, national origin, ethnicity, ancestry, military status, sex, pregnancy, sexual orientation, gender identity, disability (mental or physical), age, marital status, citizenship status, unfavorable military discharge, genetic information, order of protection status, and any other protected status under federal, state, and local law. Professional Benefit Administrators conforms to the spirit as well as to the letter of all applicable laws and regulations.