

Lawley

INSURANCE | EMPLOYEE BENEFITS

Employee Benefits Client Service Specialist

These are the *fundamental* components of the job:

- Manage a book of business in partnership with Account Executive/Client Relationship Manager
- Develop and maintain effective working relationships and liaison with client, Third party administrator, and vendor partners
- Prepare meeting materials including binders, Benefit Guides, and Open Enrollment presentations
- Track outstanding items and ensure follow-through from appropriate parties
- Facilitate carrier paperwork for new business, renewing business, and ad hoc requests
- Assist in coordinating, attending, and managing client presentations
- Maintain complete and accurate documentation in CRM (Salesforce)
- Support client retention goal of 95%

Other *functions* of the job:

- Expand and grow in your role when supporting miscellaneous duties as requested

Skills / traits that we value for this role:

- Employee benefits customer service or account management experience for 3 years or more
- Life Accident & Health License; or willingness to pursue in first 90 days
- Computers skills are a must; Including Word, Excel, Outlook & PowerPoint and the ability to learn systems in an effective and efficient manner
- Ability to prioritize and strong time management in a fast-paced environment
- Persuasive communication style and ability to communicate complex messages with a wide range of audiences on an internal and external basis (both written and verbal)
- Ability to work well independently and on a team
- Positive attitude, even in a fast-paced environment
- A passion to make customers and coworkers feel important and valued
- Capability to work quickly and efficiently
- Methodical, yet swift decision-making skills



Lawley provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to age, race, creed, color, religion, sex, sexual orientation, national origin, citizenship, immigration status, gender identity or expression, military status, familial status, marital status, disability or genetics.

A bit about Lawley!

- We are not a call center environment
- We achieve success by building genuine relationships together, with our teams and clients
- We are a family owned insurance broker (70+ years!)
- We are deeply committed to the communities we serve and love to get involved
- We work hard and play hard!!!

Why Lawley?

- Competitive salary and referral bonuses!
- Expansive Benefits (Medical, Dental, Vision—and SO many more)
- 3 weeks of PTO (prorated based on start date) AND a generous holiday schedule – available 1st day!
- Company 401K contribution received starting Day 1 (for participants 21+ years old)
- Educational support, career development, and growth opportunities
- Job Security (we've never had a lay-off, even during the pandemic)
- Flexibility, including hybrid schedules! Business hours 8am-4:30pm
- Comfortable, family-oriented culture, with an emphasis on work life balance
- Unlimited Volunteer Time Off opportunities (so you can assist in serving our communities)
- Fulfilling opportunities that align with your career path and our business needs

The compensation range for this position takes many factors into consideration including but not limited to: years of experience/training, skill set, and licenses/designations. It is not typical for an individual to be hired near the top of the range for a position as circumstances and location can vary in every hiring situation. A reasonable estimate of the current range is \$43,642.50 to \$72,737.50.

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