

# Lawley

INSURANCE | EMPLOYEE BENEFITS

## Employee Benefits Account Coordinator, Small Business Solutions

### These are the *fundamental* components of the job:

- Manage and retain a book of small (2-25 lives) accounts without producer involvement
- Primary contact between client and carrier
- Prepare digital meeting materials
- 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 and managing virtual client presentations
- Maintain complete and accurate documentation in CRM (Salesforce)
- Support client retention goal of 95%

### Other *functions* of the job:

- Proactively manage the renewal timeline for clients
- Facilitate implementation of new clients
- Expand and grow in your role when supporting miscellaneous duties as requested

### Skills / traits that we value for this role:

- 3 years' experience in employee benefits, customer service or account management preferred
- Bachelor's degree and Life Accident and Health license preferred; ability to obtain in 90 days
- 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)
- Strong PC skills required including Microsoft Word, Excel and PowerPoint and the ability to learn systems in an effective and efficient manner. Salesforce CRM experience a plus
- 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

### A bit about Lawley!

- We are not a call center environment

*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.*

- 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!
- Outstanding Benefits (Medical, Dental, Vision)
- Additional voluntary benefits including critical illness, accident insurance, hospital indemnity, supplemental life insurance, legal and identity protection and pet wellness
- 3 weeks of PTO (prorated based on start date) AND a generous holiday schedule – available 1<sup>st</sup> 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 \$45,000.00 to \$72,737.50.

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