

## Senior Client Manager

### BRIEF DESCRIPTION:

**The Senior Client Manager is the guardian of the strategic customer relationship and orchestrates the deployment of resources to provide comprehensive products, services, and solutions to strategic key accounts.**

*The Senior Client Manager provides consulting services and advise clients in matters relating to employee benefit programs such as current market trends, compliance, wellness, data analytics and short/long-term planning to meet client objectives. This role is also responsible for the retention of assigned accounts by delivering exceptional customer service and technical expertise to meet overall client objectives. Other core responsibilities include facilitating and driving agency best practices for internal and external communication to deliver customizable solutions to the client as well as looking for opportunities to round out current accounts and write referral business to assist in agency growth.*

### ESSENTIAL DUTIES AND RESPONSIBILITIES

- Consistently ensure 100% complete and total client satisfaction
- Manage the level of service provided to assigned accounts to meet revenue, profitability and retention goals and client expectations
- Lead efforts to promote agency differentiation, expertise through webinars, seminars, workshops, and face to face client interactions
- Coordinate and assist clients with strategic planning, setting goals and objectives, renewal planning and establishing timelines, including development of strategic plans, when appropriate
- Maintain strong relationships within client organizations at the decision maker and end-user levels
- Present a consistent DSG image to assigned clients
- Demonstrate the ability to clearly articulate total cost of ownership and value contribution to assigned accounts within DSG
- Develop, implement, and manage project plans in conjunction with the client
- Prepare and conduct quarterly strategic account planning meetings
- Act as communication conduit for entire DSG organization to assigned accounts
- Serve as the primary escalation contact for client resolution of issues
- Initiate and promote continuous improvement of procedures, processes, standards, and programs to gain cost-effectiveness and efficiency and execute implementation
- Develop and execute account plans for assigned accounts to ensure retention
- Continuously helps identify the need for new products and develops innovative solutions for clients; identify and capture new sources of revenue within assigned accounts through development of cross-selling initiatives
- Develop and deliver detailed, accurate and timely revenue forecasts to management
- Develop and negotiate contract terms, rates, plans, schedules, resources, involvement, and roles/responsibilities
- Identify the factors which influence business performance and recommend actions to improve profitability and/or enhance revenue for DSG
- Develop deep understanding of the clients' business strategic priorities, risk strategies and risk management needs to help provide knowledge and advice to complex clients
- Complete policy management activities and delivery of reviewed policy to client and helps address client inquiries, as necessary
- Independently oversee and manage large or complex accounts and bring the entire team together to formulate the procedure and go to market strategy, when necessary
- Work to maintain a comprehensive understanding of the clients' ongoing business strategic priorities, risk strategies and risk management needs to provide advice accordingly to successfully serve clients.
- Utilize expert risk expertise and knowledge of industry and insurance marketplace to review clients' exposures and loss experience and develop solutions for complex clients' needs, including recommending additional products and services as solutions.
- Build and maintain relationships with carriers, TPAs, underwriters, PBMs, and more, and is involved in the placement of sophisticated insurance programs

- Deliver technical expertise and taking the lead role in presentations of RFP's
- Receive and analyze quotes from carriers and provide analysis and recommendations
- Develop, present, and oversee the execution of renewal/placement strategies
- Continually build knowledge and skills to keep pace with market trends

#### **REQUIRED EDUCATION AND EXPERIENCE:**

- Bachelor's degree and a minimum of 5 years' experience in Health and Welfare Consulting required, with specific account management-related experience preferred
- Experience in the 100-2000 employee segment market (Texas market experience preferred)
- Specific experience operating at the C-level regarding negotiations, business development and relationship management
- Effective analytical, math and problem-solving skills, sound judgment, strong decision-making ability, confidence to make difficult decisions and excellent communication skills
- Must be organized, detail oriented and able to translate big picture ideas into client objectives

#### **DESIRED KNOWLEDGE, SKILLS AND ABILITIES**

- Technical expertise in multiple areas, including but not limited to compliance, data analytics, enrollment platforms as well as employee communication and client support at all levels of the company (CEO, CFO, HR)
- Strong organizational, management and account planning skills with analytical skills and strong attention to detail
- Work in a high production team environment with a high degree of complexity while also being able to operate independently and provide appropriate information and direction to other colleagues
- Provide effective, accurate, clear communication to internal company team members and clients
- Ability to interact in a professional manner with clients, vendors, carriers, underwriters, and internal departments within DSG
- Ability to interact with and focus on information gathering and collaborative solution development in a proactive manner
- Ability to handle sensitive and confidential information; perform all job duties in a HIPAA compliant manner
- Ability to lead team development and motivate others
- Maintain a positive work atmosphere by acting and communicating in a manner that instills good working relationships with customers, clients, co-workers, and management
- Project management capability
- Excellent troubleshooting, decision making and problem-solving skills
- Solid interpersonal, verbal, and written communication skills
- Ability to multitask and successfully operate in a fast-paced work environment; prioritize projects and meet deadlines
- Ability to follow through on and successfully execute tasks while adhering to specified quality standards
- Must be proficient in the use of PC such as keyboard skills and electronic folder/file organization and management, Microsoft Office Suite (Outlook, Word, Excel, PowerPoint); proficiency in Publisher and Access as well as Adobe is a plus
- Experience with AgencyBloc, Employee Navigator, BSwift, BusinessSolver, Asana, and/or Hubspot is a plus
- Aptitude for learning internal systems, applications, and internal workflow of the department
- Bilingual, Spanish speaking is a plus

### **Why choose DSG?**

When you work at DSG, you'll experience real opportunities to help people and businesses become more secure and successful. As a valued DSG team member, you'll get personal and professional development opportunities, a driven and entrepreneurial team-oriented environment, and leaders who are committed to maintaining high levels of colleague engagement.

DSG's success is strongly attributed to gaining new insights from diverse thinking and taking risks on new ideas. We embrace a culture that celebrates and promotes the many backgrounds, heritages and perspectives of our colleagues and clients.

We are always seeking those with ethics, talent, and ambition who are interested in joining our client-focused team.

### **We believe in a business culture that supports a healthy and safe work environment.**

*DSG offers competitive salaries and comprehensive benefits and programs including: health and welfare, 401K, domestic partnership benefits, career mobility, and other programs.*

*For more information about our company, please visit us at: [www.dsgbenefits.com](http://www.dsgbenefits.com)*

### **What makes you stand out?**

- Ability to build strong relationships and build rapport with internal colleagues, clients, and carriers.
- Self-starter: resourcefulness with the ability to bring solutions and ideas to the firm.
- Being able to be part of a collaborative team and feel that you can make an immediate impact.
- Having an interest in how you fit in the larger picture of achieving the organization's goals and an interest in how to meet those goals.

### **What's in it for you?**

- An opportunity for long term growth within a dynamic and growing business unit.
- Ability to make an immediate impact to support our book of business and growth of the organization.
- A chance to feel good about the work that you/we do for our clients.
- A position with competitive compensation package where the potential for growth and advancement are ample and tied to merit, work ethic, and performance.