

Company: Washington Counties Insurance Fund (WCIF)
Job Title: Account Executive
Salary Range: 7
Status: Exempt
Date Last Revised: November 26, 2018

SUMMARY:

The Account Executive serves as WCIF's representative to the members in their assigned book of business, as well as the public in general. The Account Executive's responsibility includes all facets of customer service, marketing of new products, as well as providing education and training for their clients. The Account Executive will also work together with the WCIF Team to bring new business to WCIF.

ESSENTIAL FUNCTIONS:

1. Provides expertise and advice on WCIF plans and services offered to WCIF member employers and plan participants.
2. Provides all facets of customer service to their assigned book of business.
3. Updates and maintains Customer Service Management Database for assigned book of business.
4. Plans, coordinates, and attends annual benefit fairs for member employers in their book of business.
5. Prepares RFP's and otherwise assists in marketing WCIF products and services as directed.
6. Assists in planning renewal and administrator training meetings and presents on topics as directed.
7. Assists in organizing, preparing, coordinating, and reviewing materials and communications to insure that all information is provided timely and accurately.
8. Assists in the preparation of renewal and other documents and manuals that require annual review and revision.
9. As budget and time constraints allow, attends educational and training classes or seminars in order to competently fulfill job responsibilities and maintain licensing requirements.
10. Assists other WCIF staff, as may be required, in completing critical tasks or projects in an accurate and timely fashion.
11. Successfully completes special projects as may be assigned.
12. Works both independently and as part of a cohesive team with other WCIF staff members to facilitate the effective and efficient operation of WCIF in order to accomplish organizational goals.
13. Conducts themselves in a professional manner in both appearance and conduct at all times.

ORGANIZATIONAL RELATIONSHIPS:

The Account Executive reports to the WCIF Executive Director but may also receive direction and oversight from a Sr. Account Executive.

QUALIFICATIONS AND SKILLS:

The Account Executive must have an excellent understanding of the health benefits industry and be capable of gaining comprehensive knowledge of the products and services offered by WCIF. The position requires at least three years' experience in the health benefit industry, preferably as a licensed producer. The Account Executive must have exceptional verbal and written communication skills to facilitate successful interaction with members and partners in a professional manner. The position also requires the ability to make presentations to both large and small groups in language that is appropriate to both the complexity of the topic and the knowledge and understanding of the audience. The Account Executive must have and maintain a Washington State Insurance Producer License. In addition, the position requires a working knowledge of Microsoft Office software including Word, Excel, PowerPoint, and Publisher. A working knowledge of Zywave Brokerage Builder or other client management software is preferred. As a significant amount of travel is required for this position, a valid Washington State Driver's License is required.

BEHAVIORAL STANDARDS:

As an organization and as individuals, we at WCIF value honesty, integrity, transparency, commitment, and mutual respect in interactions with our members, our partners, the public, and each other. All employees are expected to represent WCIF in a positive and professional manner that exemplifies these values.

PHYSICAL REQUIREMENTS AND WORK ENVIRONMENT:

The majority of the Account Executive's duties are performed in an office environment, but a significant amount of travel, including overnight and air travel, is also required. Continuous repetitive arm and hand movement is essential to performance. Must be able to discern voice conversation, have the physical ability to perform essential job functions, have hand-eye coordination sufficient to operate computers, phones, and other office equipment such as postage machine, fax, and photocopier. Must also be able to produce legible handwritten documents and must be physically capable of lifting up to 50 pounds, if necessary. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the position.

The duties set forth in this job description are intended only as illustrations of the various types of work that may be performed. The omission of specific duties does not exclude them from the position if the work is similar and a logical assignment to the position. This job description does not constitute an employment agreement and is subject to change by the employer as the needs of the employer and requirements of the job change.

Signature of Employee

Date

Signature of Executive Director