

## **Benefit Analyst**

### **Summary:**

Work directly with Client Service Team (Client Managers, Client Executives and Principals) to provide a high level of client support in response to routine client requests and needs, act as liaison with carriers, and maintain client and carrier information.

### **Essential Duties and Responsibilities:**

Support the Client Service Team with the renewal process.

- Gather client census data, current / renewal plan design and rate information, historical claims experience data, and any additionally related materials required to prepare RFP for client renewals and prospective groups.
- For specifically assigned clients, provide Marketing Associates RFP information and respond to questions for clarification if needed.
- For clients not assigned to the Marketing Unit, follow processes and procedures to market clients for renewal process.
- Analyze market proposals received from Marketing Associates to verify benefits, premium rates and competitiveness.
- Finalize and maintain client and carrier spreadsheets in accordance with internal requirements and client requests.
- Prepare and coordinate materials for the enrollment process and other formal client presentations.
- Work with carrier representatives to coordinate activity for a smooth implementation of new plans.
- Coordinate Administrative Installation with insurance carrier and participate in installation meetings.
- Maintain Agency Management System and the ImageRight System.
- Follow processes and procedures as outlined in the Procedure Manual.

Provide day to day client service

- Act as liaison for client to research and resolve coverage, claim and administrative problems.
- Respond to client and carrier questions in a timely manner, requesting assistance from others on the Client Service Team if needed.
- Ensure the client data is accurate and current upon each renewal and throughout the policy period.
- Prepare files and other records needed by Barney & Barney.

Develop good relationships with others on the Client Service Team.

- Maintain the professional standards established by Barney & Barney when working with clients.
- Provide back up to other Benefit Analysts as needed.
- Share information with Benefit Analysts and others to create a good network of information within the Department.
- Attend monthly Analyst meetings and other meetings as requested.

### **Education and/or Experience:**

- Must possess a basic understanding of health and welfare plan benefits and carriers acquired through 3 to 5 years experience preferably by providing group health and benefits service at a brokerage or carrier. A successful work history of strong client service skill with progressively greater levels of responsibility is required.
- Bachelor degree strongly preferred.
- Maintain a valid, unrestricted State of California Life & Disability License and meet the continuing education requirements.
- Maintain a valid Drivers License and dependable transportation.
- Proficiency with Microsoft Word, Excel and PowerPoint to include professional work experience creating tables, charts, graphs, pivot tables and formulas.
- Math skills are required to perform basic arithmetic, calculate percentages and amounts based on a percentage increase/decrease
- Excellent communication skills, both verbal and written with the ability to do oral presentations.

## **Benefit Analyst**

- Above average analyzing, problem solving and planning/organizational techniques are essential.

### **Work Environment and Physical Demands:**

- Ability to use computer keyboard and sit in a stationary position for extended periods as well as the use of office equipment such as fax and copy machines, and telephones.
- Work is performed in a typical interior/office work environment.
- Occasional travel to client sites may be required. Travel is usually within driving distance.