

Benefit Analyst

Department: Small Business Division
Reports To: SBD Director of Operations

Status: Non-Exempt
Revision Date: February, 2006

Summary:

Benefit Analysts within the SBD assist Principals, Account Executives (AE's), and Account Managers (AM's) to provide outstanding professional service for employee benefits for groups of 2 – 50 lives.

Essential Duties and Responsibilities:

- Work on insurance carrier selection and the bidding process (both new & renewal) with Principals, Account Executives, and/or Account Managers.
- Analyze proposals, inclusive of rates and benefits.
- Review bid results with Principals, Account Executives, and/or Account Managers.
- Maintain our Agency Management System.
- Track renewals and proposals.
- Coordinate and prepare materials required for formal client presentations.
- Participate in presentations with Principal or Account Executive as requested.
- Prepare and coordinate announcement material for enrollment process for sold or transferred business.
- Work with carrier representatives to coordinate activity for a smooth implementation of new plans.
- Coordinate and conduct employee open enrollment meetings as requested.
- Coordinate “Administrative Installation” with insurance carrier representatives and participate in installation meetings.
- Prepare files and other records needed for Barney & Barney.
- Participate in market research projects.
- Keep abreast of the marketplace.
- 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.
- All other duties as assigned.

Education and/or Experience:

- 5 years office administration experience in a fast paced, service oriented professional office environment, and a minimum of 1 year experience directly related to the responsibilities noted above is required.
- Obtain and/or maintain a valid, unrestricted State of California Life & Disability License and meet the continuing education requirements.
- Proficient in the use of MS Office software (Outlook, Word and Excel) and the Internet.
- Excellent communication skills, both verbal and written.
- Must be well organized, dependable and team oriented with the ability to prioritize. Analytical and problem solving skills are essential.
- Ability to exercise independent judgment and initiative within established guidelines.

Work Environment and Physical Demands:

- Ability to use computer keyboard and sit in a stationary position for extended periods as well as use office machinery such as fax and copy machines, and telephones.
- Work is performed in a typical interior/office work environment.